

Policies and Procedures

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# Storage of Information Policy

- 1.1. The purpose of this policy is to provide a set of guidelines on how employees must manage their workplace information and records inside the company.
- 1.2. This policy is intended for all employees of Ace Finance and must be applied to all company information and records acquired from business activities such as conducting research on specific industries for business consultancy services and compiling financial data for accounting and bookkeeping.
- 1.3. Work information can be stored in assigned network drives and cloud storages for backup.
- 1.4. Do not, under any circumstance, give your log-in details to anybody. Any emergencies that require someone else to log in to company computers using your log-ins will be to inform you of such instance. No employee of Ace Finance, not even upper management nor IT, will ever ask for your log-in details for any account.

### **PROCEDURES**

Storage in network drives

Network drive storage allows for immediate, internal, on-site, offline access to company files while maintaining the security of data.

- 1. Log in to your assigned company computers using your account details.
- Access the computer network drive Ace FinanceCloud sss
   (Q:). Should you experience difficulties with completing this, contact the IT Service Desk for assistance.
- 3. Open the "Ace Finance [team] files" folder.
- 4. Create a new folder under their names using the following naming convention: [Last Name] [First Name]
- Create files under the file naming convention as follows:Ace Finance\_ [Last Name] \_ [First Name] \_ [File Name].docx

### Cloud storage

Cloud storage allows for immediate, remote access to company files as well as a back-up in cases of on-site hardware failure or breach. Also covered by the policies of the organisation to maintain the security of data.

- 1. Log in to your assigned company computers using your account details.
- 2. 2. Access Google Drive using your approved company account details. Each employee is provided with their login details for access to Google Drive.
- 3. 3. Each employee is provided cloud storage links by their managers to specific google drive folders for storage and use. Use links as instructed by your managers.
- 4. 4. Use the file naming convention as stated above.

### **Emergency Access**

To ensure that company files are accessed only by authorised personnel in the event of an emergency, any instance that an employee's log-ins are needed to access data on company devices or storages and said the employee is indisposed:

- 1. Direct superior of said employee or HR will contact said employee to inform them of the nature of the emergency and the need to access said device.
- 2. Said employee either:
  - 2.1 Confirms receipt of the message
  - 2.2 is unable to respond.
- 3. IT is then tasked to reset the employees' password and logs in using a temporary password and is reset again to be changed by the employee upon return.

Internet Access and Computer Usage Policy

Policy Number: {insert unique number}

Policy Date: {insert date of policy}

Guidance: This policy should be read and carried out by all staff for all internet access and computer usage.

**Purpose of the Policy** 

1.1 The purpose of this policy is to provide a set of guidelines for employees to follow when using company electronic communications or systems, including company computers and the Internet, in accessing digital information whilst

providing digital security through measures such as encryption, back-ups, checks, and updates.

1.2 This policy is intended for all employees of Ace Finance and must be applied to all workstations where employees

are provided with access to the internet and company computers.

1.3 If you use any computer for an unlawful purpose you may be reported to the police if a crime is involved and any

other appropriate authority and your employment with us may be terminated on the grounds of misconduct.

1.4 All digital security settings set up, but IT must be maintained and followed at all times, should certain policies

conflict with duties such as log-in and access issues, contact IT and, if necessary, direct superior beforehand.

1.5 Software updates, especially security updates, not noted or being reviewed in the roll-out schedule is

recommended to be reported to IT. These ensure up-to-date software to address any possible vulnerabilities.

1.6 Whilst the occasional use of computers for personal purposes will be tolerated (provided this is not otherwise a

breach of this policy), you must not do so excessively or allow such conduct to interfere with your normal duties.

1.7 The occasional use of computers for personal purposes is still subject to the security policies of the organisation.

While Ace Finance respects the privacy of every individual, this must not be used as a guide to jeopardise the security

of the organisation, its clients, and employees.

**PROCEDURES** 

1. Use your login details to access your assigned company computer.

2. Open the file explorer and click on "Computer". You will be given individual access to the company network

drive Ace Finance (Q:).

3. Should you encounter difficulties using your login details, you can contact the IT Service Desk for assistance.

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- 4. Each company computer is provided with access to the internet for conducting business operations. Should you experience difficulties with receiving connection, you can contact the IT Service Desk for assistance.
- 5. The internet is a vast source of information from innumerable sources. Ace Finance cannot control the quality or content of information that can be obtained from these sources. Employees must ensure that the information retrieved is evaluated accordingly.

# Bank Account Policy

Policy Date: Jan 2022

**Guidance:** This policy should be read and carried out by all staff for all authorisations of opening, operating, and closing bank accounts.

# **Purpose of the Policy**

This policy sets out the requirements for use of bank accounts, including opening, closing authorisation, variations to terms and conditions, reconciliation of bank accounts and bank account transactions.

#### **PROCEDURES**

#### **Opening Bank Accounts**

Any new bank accounts to be opened for the business must have the authorisation of Chief financial officer.

For each new bank account opened, the financial system must be updated, and the bank account registered by the Chief financial officer.

#### **Bank Account Authorisations**

For monies withdrawn from any bank account, whether by cheque, EFT or other online payment methods, there must be two persons authorising for each payment.

The authorised persons for bank account payments are:

- Chief Executive Officer
- Chief Financial Officer

Each payment made must be supported by invoice, receipt or other appropriate documentation and the authorisations must be attached to this documentation before payment.

Variations to Bank Account Terms and Conditions

Any variations to banking arrangements can be made or varied by Chief Financial Officer

{insert relevant job title here} is responsible for updating the financial system and/or bank account register with the new information.

### **Closing Bank Accounts**

Where it is decided that a bank account is no longer necessary, Chief Financial Officer will authorise the closure of the bank account.

The recommended bookkeeper will then be required to complete the following:

- ensure all transactions concerning the account, including cheques drawn have been completed.
- lodge with the bank a letter, signed by {insert number of persons to authorise, recommended two} authorised
   signatories advising of the closure of the account.

- meet the bank's requirements concerning account closure; and
- update the financial system and bank account register.

#### **Bank Account Transactions**

All deposits received must be banked within two days.

Unallocated direct deposits of more than one month will be investigated fully to determine the source of deposit. Where the source cannot be identified, the deposit will be allocated to Chief Financial Officer account to authorise payments, recommended setting up a suspense account to keep these funds separate and identifiable.

Cheques outstanding for more than 12 months will be reallocated back to the business through the financial system.

Where a payment stop on a cheque is required, this will be authorised by Financial Manager

Financial Manager will be responsible for carrying out the following duties regarding payment stop on a cheque:

- ensuring the cheque has not already been presented at the bank
- getting authorisation to activate the stop payment using appropriate forms from the bank
- ensuring the bank receives notification of the stop payment notice
- receiving confirmation of action from the bank of the stop payment
- ensuring the details of the stop payment are kept in the stop payment folder.

# Style Guide

# ACE Finance Corporate Identity

Advertising plays an important role in communicating the ACE Finance Corporate Identity. The overall objective of ACE Finance advertising is to promote awareness of ACE Finance as a modern, progressive, and user-friendly multi-faceted corporate facility.

### In addition, it also:

- Builds the ACE Finance brand by presenting a single, unified corporate positioning and look
- Positions ACE Finance as a premier accounting services with a holistic approach to accounting by providing financial literacy information through training and networking in Australia
- Attracts new staff, students, and benefactors.

All ACE Finance advertising is placed through its General Manager Marketing who will develop and maintain the visual corporate style in consultation with the CEO. These style guides are not presented in this manual.

ACE Finance' General Manager Marketing is responsible for the placement of all ACE Finance advertisements in print and electronic media, with the exception of staff recruitment advertisements which are placed by Human Resources.

The General Manager Marketing liaises with Centres and Head Office on the copy, content, and style of their advertisements to maximise effectiveness, minimise costs and ensure consistency with the ACE Finance corporate style. The General Manager Marketing can also provide expert advice on any marketing or advertising issue.

For further information about advertising contact General Manager Marketing on (07) 1234 5678.

# Clothing

Clothing developed as staff or sponsor 'uniforms' should adhere to the branding guidelines, particularly in relation to colour and logo placement.

The ACE Finance clothing colour options are available from the General Manager Marketing.

The ACE Finance Logo should always appear in the upper left area of the clothing approximately 85mm wide x 35mm high.

Orders should be placed with the General Manager Marketing.

Exceptions may be granted if there are functional reasons that require a different design. Enquiries should be directed to the General Manager of Marketing.

# Name Badges

Plastic name badges are available for ACE Finance staff. Space is limited with this design so thought may be required to customise this design to fit.

There is space on the badges for 3 levels of information:

- 1. Title (optional): 9pt font size, initial CAPS followed by lowercase font
- 2. Name: 14pt font size, Initial CAPS followed by lowercase font
- 3. Position (optional): 9pt font size, initial CAPS followed by lowercase font These

badges are available with either a magnetic fastener or a pin-clip fastener.

Order name badges from General Manager Marketing and provide the following information:

- Type of fastener (magnetic or pin)
- Script details
- Centre account code to charge badges to.

By using written style guidelines to present outsiders with a single, unified 'voice' ACE Finance can project a polished professional image that fosters our brand credibility. This style guide provides clear communication direction that brings accuracy and proficiency to our organisation. The ACE Finance style guide provides you with the basics of our corporate communication's style for your reference and use.

# Document Formatting General Formatting

- Use capitalisation on the following:
  - o Proper names, including names of a department, e.g., Operations Department
  - o Beginning of sentences

Do not capitalise job roles/titles in between sentences, unless used as a form of address, e.g., Director John Murphy, Governor Edwards. Otherwise, it should be in lowercase.

- General text formatting:
  - o Font: Calibri
  - o Font Size: 10
  - o Font Colour: Black (Auto)
  - o Paragraph Alignment: Justified
  - o Page Size: A4 (8.27" x 11.69")

# Reports

Your report should be typed, single-spaced on standard-sized paper (A4) with 4 pt. spacing between paragraphs, 2.5 cm top margin, 3 cm on both sides and 3 cm on the bottom. You should use 9 pt. Calibri font.

Include a page header at the top of every page. To create a page header, insert page numbers flush right. Then type "Subject of your Report" in the header flush left.

### Major Paper Sections

Your report should include four major sections: Title Page, Abstract, Main Body, and References.

### Title Page

The title page should contain the title of the paper, the author's name, and the Centre or organisational affiliation. Include the page header (described above) flush left with the page number flush right at the top of the page.

Type your title in upper and lowercase letters centred in the upper half of the page. ACE Finance recommends that your title be no more than 12 words in length and that it should not contain abbreviations or words that serve no purpose. Your title may take up to one or two lines. All text on the title page, and throughout your paper, should be single-spaced with 6 pt. spacing between paragraphs.

Beneath the title, type the author's name: first name and last name. Do not use titles.

Beneath the author's name, type the Centre or organisational affiliation, which should indicate the location where the author(s) is/are employed.

### **Abstract**

Begin a new page. Your abstract page should already include the page header (described above). On the first line of the abstract page, centre the word "Abstract" (no bold, formatting, italics, underlining, or quotation marks).

Beginning with the next line, write a concise summary of the key points of your report. (Do not indent.) Your abstract should contain at least your topic, questions, participants, methods, results, data analysis, and conclusions. You may also include possible implications of your report and future work you see connected with your findings. Your abstract should be

a single paragraph single-spaced with 6 pt spacing between paragraphs. Your abstract should be between 150 and 250 words.

You may also want to list keywords from your paper in your abstract. To do this, centre the text and type Keywords: (italicised) and then list your keywords. Listing your keywords will help others find your work in the ACE Finance database.

### Main Body

This is main part of the report, where you present your work. The introduction and conclusions act as a frame for the body only. Therefore, all the details of your work (including a summarised version of material in the appendices) must be included here in the appropriate section. You will need to put some thought into the ordering of the sections; the presentation of information should flow logically so that the reader can follow the development of your project. It is also essential that you choose concise but informative headings and subheadings so that the reader knows exactly what type of information to expect in each section.

The body of the report:

- Presents the information from your research, both real world and theoretical, or your design
- Organises information logically under appropriate headings
- Conveys information in the most effective way for communication:
  - o Uses figures and tables
  - o Can use bulleted or numbered lists
  - o Can use formatting to break up large slabs of text.

# Referencing

Harvard system referencing is used:

Author surname, Initials, Date of Publication, Title, Publisher, Address (City,

State)Example:

Stratford, SJ, 2009, Health Care, Infobase Publishing, 132 West 31st Street, 17th Floor, New York, NY 10001

Internet site references must include the following:

Author/ authoring body name (the person or organisation responsible for thesite)

- Year (date created or last updated)
- Title (in italics)
- Name of sponsor of site
- Accessed day month year (the day you viewed the site)
- URL or Internet address (pointed brackets)

# Example:

World Health Organisation 2013, Financial crisis and global health, The UnitedNations, accessed 1 August 2013,

<a href="http://www.who.int/topics/financial">http://www.who.int/topics/financial</a> crisis/en/>.

#### Letters

Use the 'ACE Finance Letterhead Template' available within the company SharePoint system.

**Heading Spacing** 

- 0 Indentation
- 0 pt 'Before' spacing
- 0 pt 'After' spacing

# Date

Three single spaces before the date from top margin and three single spaces to the address.

# Address

Arrange address in the manner presented below:

Name

Job Title (if

required)Address

City State Postcode

Follow the address with three single spaces to salutation.

# Salutation

Address the recipient of the letter, sample:

Dear {first name or Mr/Ms as appropriate}

Follow by one single space to the letter body.

# Letter Body

- O Indentation
- 6 pt 'Before' spacing
- 0 pt 'After' spacing

Followed by three single spaces to the closing line.

# Closing Line

Include the appropriate closing line for the letter, sample:

### Yours sincerely/faithfully (as appropriate)

This is followed by six single spaces with the following formatting:

- O Indentation
- 0 pt 'Before' spacing
- 0 pt 'After' spacing

# Signature

- Name of Author in bold
- Job Title in bold

### Business card

Business cards can be ordered from Head Office. The following information will be included:

- Line 1- Full Name set in Mid Blue. Position title (e.g., Centre Manager)
- Line 2 Qualifications (optional)
- Line 3 Centre Location

#### Please note:

- No additional logos or items to appear
- Only Bounce email addresses to be included

# With Compliments Slip

Printed with compliments slips can be ordered through Head Office. The ACE Finance Centre address will be included.

### PowerPoint

ACE Finance provides PowerPoint presentation templates to ensure cohesion of visual identity and branding across all ACE Finance centres.

This template must be used as supplementary visual aid during:

- Departmental/team staff meetings
- Client briefings
- Onboarding presentations

The PowerPoint files include a variety of page styles. Included in each of the files are two preparedpages:

- Title page (with optional space for images)
- Body page

Text boxes on these pages are set up so you can use font Century Gothic for all text.

How to create a presentation using the ACE Finance' PowerPointTemplate

- 1. Once downloaded, select the title page, and add images if required
- 2. To duplicate the slide for including body text, go to the top menu bar then 'Insert> Duplicate Slide'. This will create a new slide with the body page style.
- **3.** Create your presentation considering using the following rules:
  - a. Limit content to at least two sentences or three to five bullet points
  - b. Use font sizes 30pt or larger
  - c. Limit font styles (italics, bold, underline) to at least one per slide

### **Business Case**

ACE Finance provides a business case template to ensure a streamlined project overview before the initiation phase of any project.

You should use 10 pt. Calibri font.

The titles of each section of the business case must size 16, Calibri. Subsections are aligned left and typed in bold, size 14, Calibri.

A blank line must be left after the body of each subsection.

# **Major Business Case Sections**

Your business case should include the following major sections:

- Executive Summary
- Finance
- Project Definition
- Project Organisation

#### **Executive Summary**

This section must contain a summary of the main points of the business case. This section must cover all the important information covered in your business case and provide sufficient context to your reader.

Include the page header (described above) flush left with the page number flush right at the top of the page. Your executive summary must be no more than two pages.

#### Finance

Your finance section must be on a new page and already includes the page header (described above). In this section, you must include two subsections:

- Financial appraisal
- Project / budget risks

When writing the content of the financial appraisal, ensure to seek advice from the Finance Department. Information found in the financial appraisal must include the financial implications for the project and a comparison of project costs against forecasted benefits. This is to ensure that the project is affordable and is worth its value for money. This is also to assist in predicting cash flow.

The business case must consider project risks and their estimated impact on project outcomes, i.e., determine the costs involved in the project and what variables might impact a change in the budget / project costs. This provides a list of possible scenarios that must be taken into consideration for this project.

### **Project Definition**

This is the largest part of the business case. This section contains details relevant to the project sponsor, stakeholders, and project team. This section must also answer the why, what, and how questions about the project.

This section must contain the following subsections:

# Background Information

Your background information must provide a clear introduction to the business case and your project. This includes a brief overview of the reasons why you are proposing this project. You can refer to relevant projects and documentation in this subsection if necessary.

**Business Objective** 

This subsection includes the reasons why you are doing the project.

This includes your goal, materials needed to overcome the problem, and howthe project will support the business strategy.

Benefits and Limitations

This subsection includes both the benefits and limitations of the project. The benefits written in this subsection must include both financial and non-financial benefits.

Option Identification and Selection

This subsection must include a list of potential solutions to the problem. These solutions must be described in sufficient detail. This must show how these solutions will be demonstrated and provide explanations for any unfamiliar terms.

Scope, Impact, and Interdependencies

This subsection must describe what is included and excluded for thisproject, and how this project is interdependent with other projects. This subsection must also include the work needed to meet the business objective and the business functions affected by the project.

Outline Plan

This subsection must provide a summary of the main project activities and the overall schedule for the project. The main project activities must include a brief description and a list of major deliverables required.

Market Assessment

This subsection must provide a detailed understanding of the market in which ACE Finance operates. This includes a political, economic, sociological, technological, legal, and environmental analysis.

#### Risk Assessment

This subsection must include a summary of significant project risks, opportunities, and how they are managed.

### Project Approach

This subsection describes the way in which work is done to deliver the project.

### Purchasing Strategy

This subsection describes how the project will be financed and whether major financial decisions should be taken by the organisation before purchasing. This also includes the purchasing process used for this project.

### **Project Organisation**

This is the last section of your business case. When writing your project organisation, you must describe how the project is set up. This includes the following subsections:

- Project governance
- Progress reporting.

Project governance includes the following information:

- Roles and responsibilities
- Project tolerances
- Project standards
- Review points
- How decisions are made.

After writing your project governance, write the progress reporting subsection. This must describe how project progress is recorded and how the project board will be updated on project performance.

### **Business Letters**

ACE Finance provides a business letter template to ensure all formal correspondence bearing the ACE Finance name follows the standard ACE Finance formatting. Employees can use the business letter template to correspond with partners and clients for various purposes such as introducing ACE Finance'sproducts and services, to build relationships with their customers and business associates (e.g., expressing gratitude for continued patronage), or to offer sales incentives.

All ACE Finance business letters should explain the purpose of the business letter and contain all information needed by the recipient. Letters must be formally writtento the recipient, regardless of who the intended recipient is.

Use the following format details for all parts of this document, except the Letterhead:

- Font: Calibri
- Font size:11
- Font colour: Black (Auto)
- Line spacing: Single space, with 6 pt. spacing before and after a paragraph.

# Letterhead

- ACE Finance logo
  - o Centre aligned
  - o Calibri Bold, font size 14
  - o Line spacing: Single space, with 6 pt. spacing before and after paragraph

# Please use the logo provided below:



- City and state/territory of the business
  - o Centre aligned
  - o Calibri, font size 12
  - o Line spacing: Single space, with 6 pt. spacing before and after paragraph

#### Date

- Two spaces after the letterhead and one space before the address of the receiver.
- This must follow the following convention:
  - o Day Month Year (e.g., 10 February 20xx)
- No indentation

# Address of the Recipient

- No indentation
- Layout:
  - o Name of the recipient (boldface)
  - o Job role/title of the recipient
  - o Company name of the recipient
  - o Company address (external networks)
  - o City State Postcode

# Salutation/Greeting to the Recipient

- No indentation
- One space after the address of the receiver
- Use receiver's first name (if known) followed by a comma, e.g., Hi Katie, or Dear Katie,
- Use a semi colon (:) if writing a formal letter.

# Message Body

- No indentation
- One space after the salutation/greeting to the receiver
- Paragraph alignment: Justified

# Signature

- No indentation
- Two spaces after the message body
- Use an appropriate email closing depending on the receiver of the message.
- Use the following format for your email signature, in this order:o

Email closing, e.g., Kind regards, Sincerely, etc.

- o Your signature format:
  - First Name Last Name (boldface)
  - Job role/title
  - Company name

### General Emails

Ensure that all important information relevant to ACE Finance employees are disseminated via email. This ensures that all employees receive the information. To ensure that all employeesread the email, the sender can request employees to send a read receipt upon reading the email via Gmail's functions.

Information in emails is best kept short, direct and information must be as complete as possible. Due to the chances of the recipient not reading the email upon receiving it, it is bestthat all emails contain all necessary information already to reduce the need for emails to go back and forth.

### Subject Line

- Must be short and straightforward. It must reflect what the email is about, e.g., if it's a meeting, the subject line must contain the word 'Meeting'.
- Must be limited to 50 to 60 characters.
- Must be written with letters in title case, e.g., Weekly Catchup Meeting

# Message Body

- Use the following format:
  - o Font: Calibri
  - o Font size: 11
  - o Font colour: Black (Auto)
  - o Line spacing: Multiple, 1.15 with 6 pt. spacing before and after paragraph.

### **Email Signature**

- Use an appropriate email closing depending on the receiver of the message.
- Use the following format for your email signature, in this order:
  - o Email closing, e.g., Kind regards, Sincerely, etc.
    - Calibri, Bold, font size 12
  - o Your signature format:

- First Name Last Name
  - o Use Calibri, Bold for the name only, font size 11
- Job role/title
- Department name
- Company name
- Email address
- Use Calibri, font size 10, font colour Blue, no underline

# Meeting Agendas

ACE Finance provides a meeting agenda template to ensure that all meetings are orderly and that all employees involved in the meeting are informed ahead of time what will be discussed. This also allows presenters to be informed of their role and allow them to plan the length of time for each agenda item.

All agenda items to be discussed in a meeting must be clearly listed in this template. Agenda items must be concise and clear, and organised in order of discussion, with the first topic to be discussed at the first row.

Use the following format details for all parts of this document:

- Font: Calibri
- Font size:11
- Font colour: Black (Auto)
- Line spacing: Single space, with 6 pt. spacing before and after paragraph

# Meeting Title

The meeting title should be short and clear. This must succinctly describe what will be discussed during the whole meeting.

### Date and Time

Clearly indicate the date the meeting will be held, as well as what time the meeting is expected to being.

- Date format: day Month Year (e.g., 10 February 20xx)
- Time format: hour: minutes AM/PM (e.g., 7:00AM or 6:00PM)

#### Venue

This section should clearly indicate where the meeting will occur. If this is outside of an ACE Finance Centre, sufficient instructions must be indicated to allow all participants to arrive to the venue.

### Agenda Items

Each agenda item to be discussed must be listed in the 'Agenda Item' column of the template. The list must reflect the flow of the meeting.

If an agenda item contains sub-topics, these must be listed neatly with bullet points, in the order inwhich they will be discussed or presented during the meeting.

#### Presenter

Individuals who will be presenting each agenda item must be clearly indicated in the section beside their corresponding agenda items.

#### Duration

This section must contain how much time each presenter is allocated for their agenda items.

Time allocations must be indicated by at what time they must begin discussing their agenda items, followed by a hyphen, and the time by which they must finish discussing their assigned agenda item (e.g., 9:30AM-10:30 AM)

### Procedure Documents

The procedure template provided by ACE Finance may be used by ACE Finance employees when creating new procedures for use in ACE Finance Centres. Procedures can range from simple'how to use' instructions for clients regarding certain fitness equipment or procedures for ACE Finance systems and processes aimed towards ACE Finance employees.

In all instances, procedures must be explicit and contains step -by-st ep instructions for readers tofollow in order to achieve the desired outcome.

Use the following format details for all parts of this document:

• Font: Calibri

- Font size: 11
- Font colour : Black (Auto)
- Line spacing: Single space, with 6 pt. spacing before and after paragraph

# Procedure Title

- Must be short and straightforward. It must reflect what the instructions is about
- Must be written in title case, e.g., Instructions for Scanning Documents, or How to Scan Documents

# Purpose of Procedure

- · Must describe why the procedure was created and when the procedure must be followed
- Must include who must follow the procedures listed

### Procedures

- Use a numbered list (i.e. 1, 2, 3...) to write the steps.
- Steps must be written in a logical, step -by-step order.
- Use simple sentences and words to write instructions.
- Start your instructions with action words, e.g., Open the file from your computer.
- Use boldface to emphasise important points in your steps.

# Punctuation and Grammar Hyphens

Hyphens must never be used after adverbs ending in -ly as in 'fully financed', partly 'paid' (but **part-paid** does need one). Hyphens are useful to clarify meaning: a big catlover is not the same as a big-cat lover.

In general, use hyphens to aid clarity:

'Abba will never re-form' does not mean the same thing as 'Abba will never reform.' The first sentence says the band will never play together again, and the second suggests that their past bad behaviour will never improve. 're-enter' is clearer on first reading than 'reenter' BUT cooperate and coordinator are fine without hyphens.

'It could be done by 10-year-olds' is clearer on first reading than 'It could bedone by 10 year olds.' BUT no hyphens in this: 'She was only 16 years old.'

Use hyphens to turn verbs into nouns:

# Clean up (verb) clean-up (noun)

- Lead up (verb) lead-up (noun)
- Turn up (verb) turn-up (noun)
- ram ap (vers) tam ap (noam)
- Go ahead (verb) go-ahead (noun)Shake up (verb) shake-up (noun)
- Set up (verb) set-up (noun).

A hyphen is also used to join words in a compound construction, or separate syllables of a word, like during a line break.

- Pro-American
- Cruelty-free eggs
- Em-dash
- 'It's pronounced hos-pi-t al-it -t ee.'

Email is spelled without a hyphen.

# Dashes

The en-dash is used following British conventions. This typically uses it to act as a comma or parenthesis to separate out phrases-or even just a word-in a sentence for variousreasons (i.e. an appositive). It is also used to connect values in a range or that are related. A good rule is to use it when you're expressing a 'to' relationship. Examples where an en- dash should be used:

- School is based on the three R's-reading, writing, and arithmetic.
- Against all odds, Pete-the unluckiest man alive-won the lottery.
- I sense something; a presence I've not felt since-
- ... in years 1939-1945
- Pages 31-32 may be relevant
- New York beat Los Angeles 98-95
- Olivia Newton-John
- When American English would use an em-dash-.

## Dangling Participles or Dangling Modifiers

These become a problem if a reader has to pause to work out how a sentence shouldbe understood. For example: 'Driving up to the house, her dog always barks loudly.' That split-second hesitation while you work out what's going on can be avoided by writing 'Her dog always barks loudly when she drives up to the house.' We still don't know if the dog's in the car or in the house, but at least it's not driving.

#### Hanging Participles

'Born in Hobart in 1909, his daughter Rory has now donated her father's memorabilia to the Tasmanian Museum...' That would make Rory 99-not unreasonable except this is the second paragraph of a story about Errol Flynn and his daughter Rory. Much betterto repeat the name: Errol Flynn was born in Hobart in 1909, and his daughter Rory has now donated her father's...etc.

#### Commas

#### **Parenthetical Commas**

If you remove a word or phrase from between a pair of commas, the sentence should stillmake grammatical sense. Think of them as brackets (parentheses) surrounding an additional piece of information that could be removed without destroying the sentence.

So this is right:

The author of The Handmaid's Tale, Margaret Atwood, was on the panel.

Remove 'Margaret Atwood' and you're left with The author of The Handmaid 's Tale wason the panel-and that makes sense.

But this is wrong:

Canadian writer, Margaret Atwood, was on the panel.

There should be no commas. If you remove 'Margaret Atwood' you're left with Canadian writer was on the panel, which doesn't make sense.

If there are more than one of them (as in Canadian writers) don't put the person's name between commas; if there's only one (as in author of The Handmaid's Tale) put the person's name between commas, but always use the removal rule-of-thumbto check.

No Comma between Subject and Verb

No matter how long your subject turns out to be, never put a comma between it and the verb.

- As an adult Layne Beachley, changed the face of female surfing.
- The Electricity Suppliers Association of Australia's Brad Page says Professor Ross Garnaut is wrong to suggest they should receive no compensation.
- The fact that all countries of the world would come together and agree on the rightsthat should be afforded to every human being, was truly an amazing historical event.

In all these examples the comma should not be there. If you think it's too much forthe poor reader to take in without a break, then rewrite the sentence.

Use a comma to separate the elements in a series (three or more things). "He hit theball, dropped the bat and ran to first base." You will have learned that the commabefore the 'and' is unnecessary. In newspaper writing you will seldom find a serial comma.

Use a comma+ a little conjunction (and, but, for, nor, yet, or, so) to connect two independent clauses, as in 'He hit the ball well, but he ran toward third base.'

Contending that the coordinating conjunction is adequate separation, some writerswill leave out the comma in a sentence with short, balanced independent clauses (such as we see in the example just given). If there is ever any doubt, however, use the comma, as it is always correct in this situation.

Use a comma to set off introductory elements, as in "Running toward third base, hesuddenly realised how stupid he looked."

It is permissible to omit the comma after a brief introductory element if the omission does not result in confusion or hesitancy in reading. If there is ever anydoubt, use the comma, as it is always correct.

Use a comma to separate coordinate adjectives. You could think of this as "That tall, distinguished, good looking fellow" rule (as opposed to "the little old lady"). If you can put an and or a but between the adjectives, a comma will probably belong there. For instance, you could say, "He is a tall and distinguished fellow" or "I live in a very old and run-down house." So you would write, "He is a tall, distinguished man" and 'I live in a very old, run-down house." But you would probably not say, "She is a little and old lady", or "I live in a little and purple house", so commas would not appear between little and old or between little and purple.

#### Colon and Semicolon

Use a semicolon to join two independent clauses\* where a full stop would be toostrong and a comma too weak:

- The ferry was overloaded; the owners were clearly liable.
- My sister loves mussels; her husband hates them.

Use a colon where what follows elaborates on what precedes it:

- You'll never believe my luck: I'm going to Mexico.
- You should have followed my father's maxim: 'Never borrow money'.

#### Ellipsis

- 1. Useful to show where words have been left out, either from the middle or theend of a sentence:
  - 'Once a jolly swagman camped ... down came a jumbuck...' (note spacing)
- **2.** May be used to indicate indecision or hesitation, the tailing off of a sentence, or to represent a pregnant pause-particularly useful when
  - transcribing: And that must have been a happy time, or...
  - Oh, very happy...well, maybe not completely... (note spacing)

Use three dots only...and even at the end of a sentence, no closing full stop is needed... Punctuation marks are set in stone and shouldn't be messed with. Some people type two, five, six or more dots, and this kind of free expression has no place in agrown-up document.

Note that an ellipsis with one letter space either side indicates missing text in a quotation.

<sup>\*</sup> An independent clause, or main clause, must contain a subject and a predicate: The ferry [subject] was overloaded [predicate] ... You [subject] should have followed my father's maxim [predicate]

# **Punctuation Spacing**

There are no spaces between the word and the punctuation mark, so (part one) never

\* (part one), and as follows: not \*as follows:

The exception is between a word and an en-dash: This morning - and what a morning

- was to be my last. If you choose to use an em-dash it is usual to close the spacingthus: This morning-and what a morning-was to be my last.

# Apostrophes or Inverted Commas

#### Joint or Individual Ownership

'Wolf's and Erica's daughter Faith is a writer...'

Here, because the daughter belongs to both people, only the second name needs an apostrophe, so it should read: Wolf and Erica's daughter Faith is a writer....

Even though the parents of the daughter are distinct individuals, they're treated as a single unit. You'd do the same thing if you were talking about 'Ji m and Mary's house

.

But if you were talking about books that two people have written (separately, not as co-authors), each person would need an apostrophe: John Updike's and Anita Desai'snovels are widely read...

More examples: Gilbert and Sullivan's operettas, but 'Rudd's and Howard's beliefs'

# Apostrophe After 's'

Do not add an apostrophe to any name ending in s (or ce, as in Beatrice or x as in Marx). The same applies to names with a final silent s like Dubois's or Illinois's.

#### Numbers

In body copy spell out numbers from one to ten, and then use numerals. Spell out allnumbers at start of sentence (Forty-eight people were injured...)

In headings, though, numerals are fine for everything.

For thousands and millions upwards: 3,000, 500,000, 2 million, 8 billion... abbreviate inheadings to 2b, 8m with discretion.

#### Dates

1950s, '50s and '60s, and 12 November 2004 (day, month, year but with no punctuation)

# Capitalisation

Limit initial caps (apart from those marking the beginning of a sentence) to proper nouns-that is, nouns naming a particular person or thing. Write 'Mark Scott, the ABC's managing director...' or 'John Smith, adjunct professor at ANU...'

No caps for 'premier', 'prime minister', 'president', 'executive producer', 'artistic director', 'curator', and so on, because these are all common nouns.

When used as a form of address, a common noun is capped and becomes a title: President Obama, Queen Elizabeth, Pope Benedict, Governor Bartlett; but 'Australia's prime minister,

Tony Abbott, is visiting China ...' or collectively, 'Previous popes have held similar views...' are all lower case.

# Headings

Use the capitalisation for words indicated by MS Word set on Australian English.

#### Act, act

Capitalised in 'Native Title Act 1993', lower case in 'the act was passed in 1993', or'we don't need an act of parliament to do it.'

'The Privacy Act covers your rights to privacy. This act requires others ...' is correct.

#### Italics

According to established publishing convent ion, we use italics for:

- Titles of books (but not books of the Bible) and periodicals (newspapers, magazines etc.)
- Plays and long poems
- Operas, ballets, musicals, most types of musical composition including music theatre
- Films, videos, and television and radio programs
- · Works of art including paintings, drawings, sculptures, conceptual and performance art
- Names of ships, aircraft, trains, and spaceships
- Foreign words and phrases (except for adopted words like 'cafe')When

#### NOT to use italics or inverted commas

- Band names
- Organisation names
- Festival names

# **Bulleted Lists**

First letter following the bullet should be capitalised.

Dot points that are not complete sentences need no end -of-line punctuation (comma,full stop, or semi-colon). The final dot point in the series, though, should end with a full stop.

The margin for the first bullet is set at 0 and the hanging indent is 1 cm.

# Ampersand (&)

Please avoid unless part of company name or trademark.

Slash

There are two kinds of slashes.

- (\) This is a backslash. It's not used in written English; it's only used in computing. Unless you're writing about computers or including a URL in your bibliography, don'tuse a backslash.
- (/) This is a slash, sometimes called a forward slash to distinguish it from the backslash. It doesn't have a large role in formal English, but it's used in specific cases. A slash canshow a line break in poem, song, or play, usually if several short lines are being written together on one long line. Remember to put a space after the slash.

#### **Quotation Marks**

Direct speech is enclosed in double quotation marks.

Single quotation marks are used in mostly all other instances when quotation marks are needed. Such as:

- Titles of unpublished documents
- Essays
- For a word of phrase that has been coined or that is being used in a specific sense
- For colloquial words, nicknames, slang or humorous words and phrases in formal writing

Place terminating punctuation inside the final quote mark when there is no carrier (e.g., he said)expression but outside the final quote mark when there is a carrier expression.

#### Common Errors

#### **Collective Nouns**

Committee, jury, choir, audience:

'The audience were (plural) drifting into the auditorium in ones and twos; the entire audience was (singular) on its feet.' Use of singular or plural verb depends on how you want the collective noun to be understood.

#### Into or in to

This is one word except where 'in' and 'to' belong to separate phrases, as in 'sworn in to the presidency' or 'I walked in to work'. Into is being used more and more often where 'in' by itself is enough. For instance, 'enter a film into the festival' is incorrect. All that's needed is enter a film in the festival.

#### From ... To

'Everyone from trainers, bookies, bar staff and punters are feeling it...' doesn't make sense . If you have a 'from' you need a 'to' such as 'Everyone from trainers and bookies to bar staff and punters ... 'Everything from city design to modern art to the basic box...' doesn't make sense either. We need two points, from and to. So we can say 'Everything from city design and modern art to the basic box.' We want to throw the stone from one shore to the other, not skip it over the water.

#### Due to

This means caused by, not 'because of'. So 'The delay is due to [caused by] bad weather' is correct. 'Due to [caused by] bad weather there is a delay' is widely used but 'Bad weather has caused a delay' is considered to be better usage.

# Effect, Affect

Effect is defined as the ability to bring about a result. 'His nagging had no effect whatsoever. Wait for the drug to take effect.'

The word affect means to produce a change in something. 'But that change will affect a lot of people.'

#### Disinterested

This describes impartiality, or being unbiased, having no vested interest. It does not describe a lack of interest (uninterested) although the distinction is increasingly blurred in everyday usage.

#### Others

'Between you and me' not between you and I.

'Currently' use 'now'

'Below' use following

'Above' use previously

# Referencing

Referencing used is Harvard Style as detailed at

<a href="http://www.swinburne.edu.au/lib/studyhelp/harvard\_style.html">http://www.swinburne.edu.au/lib/studyhelp/harvard\_style.html</a>

#### Sources:

<a href="http://news.anu.edu.au/how-to/storyte111ng-writing-and-media/writing-style-guide/">http://news.anu.edu.au/how-to/storyte111ng-writing-and-media/writing-style-guide/>

- Australian Oxford Dictionary, Oxford University Press 2004
- Style Manual for Authors, Editors and Printers, John Wiley & Sons 2013

#### Web links

Enclose in angled brackets e.g., '<' and'>'. Always use 'http://' as a prefix.

File Names

#### Office Filenames

The following rules for filenames apply to documents that can be saved and opened by Microsoft Office applications such as Word, Excel, and Power Point. The same rules apply to similar applications that can also open the documents.

The file name must include in the beginning the date when the file was first saved, following the format of the full year, month and day in number form with no spaces (i.e. 20071202, 20160811)

The purpose or the title must be the second part of the file name, following the date in title case and without any space. If the file is edited from an existing template, remove words 'fillable' or 'template', if any, and follow the title of the original file without any spaces. (i.e., Action Plan, Meeting Agenda)

Lastly, the version number of the file will be the last part of the file name, where the version number is the number of times the file has been edited. This must be written with a capital 'V' followed by at least two digits (e.g., VOI). If it is the first time that the file is being saved, write VOL Otherwise, increase the version number by one from the previous one. (i.e., VO3, VII)

Using the three rules for naming files, an Action Plan Template that was written for the first time on January 12, 2018 would look like: 20180112ActionPlanV01.

Likewise, a Meeting Agenda Template that will be edited for the third time from October 5, 2017 will still use the original date and title, but the version number will change from 02 to 03: 20171005MeetingAgendaV03.

#### Screenshots

Screenshots taken with a Windows function or any screen capturing software must follow the rules for naming screenshot image files.

The file name must include in the beginning the date when the file was first saved, following the format of the full year, month, and day in number form with no spaces(i.e., 20071202, 20160811)

A brief description of what the screenshot contains must be the second part of the file name. If the image contains the website of a certain company or the product page from a supplier, you can put the words that describe the image in title case, without any spaces (i.e. Company Website, Product Page). As much as possible, keep it to three words or below.

Using the two rules for naming screenshots, a screenshot taken on November 20, 2016with the image of new fitness equipment will have the filename of 20161120NewFitnessEquipment.

# Email management Policy and Procedure Policy

- ACE Finance employees and personnel will only use the provided Gmail account when sending official digital communications to fellow employees, clients, and other internal and external stakeholders.
- Emails with attachments will only be limited to files that are relevant to ACE Finance.
- Attachments must not exceed the file size limit set by Gmail.
- Email with attachments must always include a brief description of the file/s attached in the body of the email.
- All employees must confirm they received emails by responding to the email, unless it is a general workplace email blast, which does not require a response.
- Issues or concerns brought up over email are considered official documentation and may serve as evidence if needed when resolving the issue.
- Emails that can be archived can be any email that has already been resolved.
   Note: Resolving emails will be done through providing an appropriate response to each email.
- All unimportant emails or emails with outdated information may be deleted.
- Unimportant emails (which include spam emails) may be permanently deleted.

#### **Procedures**

- I. Storing Emails with Attachments:
  - Login to Gmail account
  - Select Compose
  - Write recipient/s of the email
  - Write the subject of the email



- Write the necessary details
- Attach file/s
- Send email to relevant receipt

#### II. Emptying Inboxes:

- Login to Gmail account
- Select an inbox (Primary, Social, Promotions, etc.)
- Select emails to be deleted
- Click Delete

#### III. Archiving Inboxes:

- Login to Gmail account
- Select emails to be archived
- Click Archive

#### IV. Permanently Deleting Emails:

- Login to Gmail account
- Select emails to be deleted
- Click Delete
- Go to Trash
- Select emails to be deleted
- Click Delete

# Digital Information Storage and Security **Policy**

This policy applies to all ACE Finance employees.

ACE Finance is committed to providing valuable and accurate evidence of business decisions, activities, research, and transactions. In doing so, the responsibility to create, store and maintain accurate and reliable information is vested upon the organisation.

In addition, Ace Finance is committed to the principles and practices retained in the Information Management Standard of the National Archive of Australia.

In our commitment to keep all business activity transparent and honest, we retain the access of all business information to employees except under the following circumstances:

- Client information, the access to which is limited to the direct personnel handling the client
- Member information, the access of which is limited to Customer Services and the Management.
- Sensitive financial information, the access of which is limited to the finance department and the individuals directly involved in the transactions.

Through this policy and its supporting procedures, ACE Finance will ensure that all information practices related to the creation, storage, security, and maintenance are being carried out efficiently and truthfully.

## **Procedure**

Maintenance of Digital Information

Business information must be created and maintained by providing reliable and accurate accounts of business decision and actions. This must include all pertinent information to support business needs, which included names, dates, time, and other key information.



Storing digital information must follow the steps outlined below:

- 1. Once business information is created, it must be saved into a corresponding folder related to its purpose and designation.
- 2. All filenames follow the following format: [Date Saved (DD-MM-YYYY)]-[Document Title]
- 3. Files must be saved under corresponding to the project and/or business function the information supports.

For example, Information regarding business operation must be saved under the folder "Business Operations."

- 4. Sub-folders may be made in accordance with need for organisation and efficiency. For example, an interview transcript for current market research may be saved under "Transcript" sub -folder saved within the "Marketing Research 20XX" folder.
- 5. All relevant personnel must be notified of recorded information in the database.

#### Security of Digital Information

Business information must be maintained using proper security procedures to ensure that all necessary steps are taken to protect digital information from the likes of information theft, spyware, phishing, and viruses.

- 1. All information must be saved in the cloud database created by the organisation.
- 2. Access to the following types of information must be limited to either the direct supervisor or relevant stakeholders:
  - Research information
  - Market research
- 3. For very sensitive information, the information must be saved with a password. Sensitive information corresponds to the following:
  - Financial records
  - Employee records



# Technology, Collaboration and Communication Policy and Procedure

# Overview

Digital technologies are becoming an important feature of **internal collaboration** and **communication** between Ace Finance staff and **external collaboration and communication** with our clients and external stakeholders including the Australian Tax Office and other government agencies.

Ace Finance recognises that a more advanced collaboration strategy has many benefits including bringing people together no matter where they are located and enabling access to information and tools to work effectively and efficiently. The Executive Team recognises that whilst staff have access to collaborative technologies (MS 365 suite), they are not used consistently and to the advantage of the business, at present only Microsoft Email and Skype are being used.

Digital technologies allow staff to track collaborations and communication between staff and with clients. Thus, it provides both transparency and enhanced customer service through efficient collection of client insights and sharing of information.

#### **Definitions**

**Digital technologies:** Digital technologies can be described as electronic tools, systems, devices, and resources that generate, store or process data. It can be as simple as using MS Teams to look at a document together, platforms that can transcribe virtual meetings and as complex as using artificial intelligence in speech/voice recognition. It may include applications for project management.

**Workplace collaboration:** Workplace collaboration can be described as a group of people sharing their skills, knowledge, and ideas to solve problems, achieve a common goal or produce a product or service. It can be **synchronous** where everyone interacts in real time (e.g., online meetings) or **asynchronous** where the interaction may occur at different times, for example when uploading a document to shared workspaces such as 'Drop box' or 'Sharepoint.'

**Workplace Communication:** Workplace communication refers to the process of exchanging information and ideas (both verbal and non-verbal) between one person/group and another person/group within an organisation. It can also extend to communicating with clients and organisational stakeholders.

Policy Number: 202148 Policy Date: 00/00/00

**Guidance:** This policy should be read and followed by all staff for when collaborating or

communicating using digital technologies.

Purpose of the Policy



- 1.1. The purpose of this policy is to provide a set of guidelines for employees to follow when using digital technologies for collaborating and communicating internally with colleagues and externally with clients and other stakeholders.
- 1.2. This policy provides guidance to ensure all Ace Finance employees carry out collaboration and communication activities, using available digital technologies.
- 1.3. Relevant laws and acts form part of the *Ace Finance Technology, Collaboration and Communication Policy and Procedure* and must be adhered to.
- 1.4. Employees may be reported to the police or other appropriate authorities if a crime is involved while collaborating or communicating on behalf of Ace Finance. Employment may be terminated on the grounds of misconduct.

# Available digital technologies

All employees at Ace Finance are provided with access to Office 365. It contains Word, Excel, PowerPoint, Outlook, OneDrive, Skype, SharePoint, Microsoft Outlook, and Microsoft Teams. However, other applications will be introduced as required. Some applications will be for internal purposes only.

# Introducing new technologies

New technologies will be introduced only after a comprehensive annual review of existing technologies has been conducted and research has concluded. A business case will need to be presented to the executive and approved prior to approval of budget and the implementation of any new technologies. The business plan must be formatted as per the Business Case format detailed in the *Ace Policies and Procedures* document. Specialist advice must be sought to inform any business plan for example, IT manager, line manager or external consultant. Licensing arrangements and costs must be included.

#### Your responsibilities

# **Technologies**

- All staff are expected to use provided technologies and to participate in training
  events when new technologies are introduced. The tools you are required to use are
  outlined in your position description. It is expected that some positions will play a
  larger role in identifying new and emerging trends in technologies used for
  collaborating and communicating at work.
- Only use digital technologies for which you have been authorised and trained to use.
   Speak to your manager or the IT manager to seek specialist advice in using any digital technologies.

#### Collaboration

- All collaborations must be conducted transparently and with the knowledge of your supervisor.
- Collaborative decision-making is encouraged. Please refer to the Ace Finance Decision-making Policy and Procedure and the Conflict Resolution Policy and Procedure.

#### **Communications**



- Be respectful when engaging in conversations on behalf of Ace Finance.
- Do not make declarations or promises to that you cannot keep.
- Avoid speaking on matters, making statements, or answering questions that fall outside your field of expertise or under another employee's responsibility.
- Do not disclose confidential or personal information without written approval.

# Ongoing training and developing

**Technology:** All business plans must stipulate training requirements and a training plan. Training in digital technologies for collaboration and communication will be provided as new technologies are implemented across the organisation. Workplace procedures are also available and provide step-by-steps procedures for the digital technologies you will be required to use at work.

**Collaboration and communication:** Training and development will be provided in line with organisational requirements and based on performance reviews of all staff members.

# Onboarding

All staff will receive training, where identified with Office 365. By the end of 202X all staff will be required to using at a minimum Microsoft Teams for collaborating with internal staff and OneDrive for storing information.

# Continuous improvement

Ace Finance is committed to building its internal capacity for using new and emerging digital technologies for collaboration with each other and communicating with clients and external stakeholders. To this end, we encourage all staff to communicate with their direct manager regarding building our capability. This may include participating in the Digital Technologies Working Group which meets quarterly and is convened by the IT Manager.

# Disciplinary consequences

Ace Finance will take disciplinary action leading up to and including termination if employees do not follow this policy's guidelines. If you inadvertently violate this policy, a reprimand may be warranted. Stricter disciplinary actions will apply if non-compliance continues.

# Relevant procedures, Acts and laws

- Ace Finance Policies and Procedures including:
  - Storage of Information Policy
  - Internet Access and Computer Usage Policy
  - o Email Policy and Procedure
  - Digital Information Storage and Security
- Ace Finance Employee Discipline Policy and Procedure
- Privacy and Personal Information Protection Act 1998 (NSW)
- The Privacy Act 1988 (Federal)
- Age Discrimination Act 2004
- Australian Human Rights Commission Act 1986
- Disability Discrimination Act 1992



- Racial Discrimination Act 1975
- Sex Discrimination Act 1984