

STATEMENT OF QUALIFICATION AND EXPERIENCE

SURNAME

FIRST NAME	MIDDLE

ADDRESS
HOME:
WORK:

EMAIL ADDRESS	TRN

EDUCATION LEVEL

LEVEL OF EDUCATION	YEAR COMPLETED	LEVEL COMPLETED (Certificate, Diploma, Degree)	NAME OF INSTITUTION
SECONDARY			
COLLEGE			
UNIVERSITY			

OTHER (specify)			

WORK EXPERIENCE

CURRENT POSITION/TITLE

HOW LONG HAVE YOU WORKED IN THIS POSITION?

WHAT IS YOUR CURRENT JOB DESCRIPTION? Describe the work that you do as full-time employment). Please provide as many details as possible (attach job description if you wish).

OCCUPATIONAL RECORD

List the positions for the last ten years which includes your current job title/organisation

ORGANIZATION /EMPLOYER	POSITION	PERIOD OF EMPLOYMENT (STATE MONTH AND YEAR)	NUMBER OF YEARS

Current and past Board and/or Committee and/or Volunteer positions

ORGANIZATION	POSITION HELD	PERIOD OF SERVICE (State month and year)

SKILLS and COMPETENCY

Please complete a self-assessment of your expertise, skills and competency to indicate your level of expertise, knowledge and/or experience by assigning an appropriate '**letter rating**', stated hereunder, to represent your personal rating against each **Competency/Skill area** detailed below:

Please select the appropriate 'letter rating' that accurately reflects your level of competency, the definitions of each rating to be assigned are explained immediately following the letter as follows:

RATINGS:

- ❖ **E – Expert:** Possession of a degree/diploma/certificate in the competency/skill area and/or have significant and extensive work experience in that field.
- ❖ **S – Strong:** Have direct wide experience in or significant familiarity with the field as part of work experience or other related activities.
- ❖ **G – Good:** Understanding of the basic fundamentals and concepts that are encountered in this competency/skill area.
- ❖ **B – Basic:** Have some knowledge of or familiarity with the competency/skill area.

❖ **N/A** - No Relevant

Experience: Have no knowledge of or familiarity/experience with the topic or area.

SKILLS

COMPETENCY/SKILLS AREA

LETTER RATING

- | | |
|---|-----|
| 1. Audit and Compliance: | () |
| - Performance and regulatory standards; | |
| - Examination, reviews and auditing policies and procedures; | |
| - Financial and operational auditing and reporting; compliance issues. | |
| 2. Budget Planning and Control: | () |
| - Annual and medium-term budget planning; | |
| - Budgetary analysis; variance analysis; budgetary control. | |
| 3. Credit Union System and Operations: | () |
| - Co-operative business model; key components of operations; | |
| (people; member service and relations; physical and technical infrastructures). | |
| 4. Credit, Collections and Loan Portfolio Management: | () |
| - Credit worthiness; credit collection; delinquency; | |
| - Financial assessment, analysis and evaluation. | |
| 5. Financial Expertise/Literacy and Administration: | () |
| - Preparation, interpreting and reporting of financial statements; | |
| - Financial accounting standards, principles and conventions/customs; | |
| - Financial policies and procedures. | |
| 6. Governance and Ethics: | () |
| - Board and Management policies, rules, processes and procedures; | |
| - Organizational structure; decision-making and delegation powers; | |
| - Committees; ethical and behavioural declarations and mandates. | |
| 7. Information and Communication Technology: | () |
| - Hardware and software systems and applications; networking and Databases; | |
| - Web-enabled products and services, communication and copying devices; | |
| - System design, implementation, upgrade and maintenance. | |
| 8. Investment, Treasury and Cash Management: | () |
| - Funds management and allocation and release; cash liquidity and overdraft; | |
| - Interest rates; borrowings; disbursements and security systems. | |
| 9. Leadership and Teaming: | () |
| - Leadership skills, traits and attributes; | |
| - Teamwork, project management and hierarchical structures. | |

- 10. Enterprise Risk Management:** ()
- Risk analysis, assessment and monitoring;
- Categories of risks – strategic, financial, operational, people, regulatory.
- 11. Strategic Thinking, Planning and Development:** ()
- Planning models, concepts, processes and direction; credit union expansion;
- Brain-storming; plan development, implementation and monitoring.
- 12. Executive Recruiting and Human Resource Management:** ()
- Recruitment and engagement policies and practices; performance evaluation
- Career and succession planning; remuneration, benefits and allowances;
- Pension and superannuation schemes.
- 13. Legal Services:** ()
- Loan and security agreements; service, supply and property contracts; litigation.
- Legislative and regulatory changes and amendments; disputes;
- Current legislation governing Co-operatives; Rules review.
- 14. Engineering Services:** ()
- Civil, Electrical Building Services Engineering.
- 15. Asset Management:** ()
- Property – Property development and planned and routing maintenance;
- Procurement and Inventory Management;
- Health, Safety and Environment Issues;
- Security Systems.
- 16. Marketing:** ()
- Customer Relations Management, Promotions and Sales.
- 17. Other Competencies or Skill-set Areas:** ()
- Please provide details of other competencies you may possess.

GENERAL COMMENTS AND EXPERIENCES

You are required to provide a concise statement on each of the following topics:

1. **Personal Statement of Interest** – How can I contribute to COK Sodality's Committee chosen?

2. **Community/Social/Sporting Involvement** – In which organisations, associations and/or sporting clubs are you actively involved, and in what capacity?

3. **Governance Experience** – What is your actual experience/exposure in being a Board, Management and/or Committee member?

4. **General** – State any other experience you have obtained that will enhance your contribution to COK Sodality's interests as a credit union.

DATED:

FULL NAME: **SIGNATURE:**