

## SELF-ASSESSMENT GUIDE

Qualification:	<b>MICROFINANCE TECHNOLOGY NC II</b>	
Project:	<b>PERFORM MICROFINANCE LOAN OFFICER WORK ACTIVITIES FOR ENTREPRENEURIAL DEVELOPMENT</b>	
Units of Competency Covered:	<ul style="list-style-type: none"> <li>• <b>SELECT POTENTIAL AREA FOR MICROFINANCE OPERATION</b></li> <li>• <b>PROMOTE MICROFINANCE PRODUCTS AND OTHER SERVICES</b></li> <li>• <b>FORM GROUP OF MICROFINANCE CLIENTS</b></li> <li>• <b>FACILITATE CENTER MEETING</b></li> <li>• <b>PROCESS APPLICATION FOR LOANS AND OTHER SERVICES</b></li> <li>• <b>COLLECT DUES</b></li> <li>• <b>UPDATE FINANCIAL RECORDS</b></li> </ul>	
<b>Instruction:</b> <ul style="list-style-type: none"> <li>• Read each of the questions in the left-hand column of the chart.</li> <li>• Place a check on each question to indicate your answer.</li> </ul>		
<b>Can I?</b>	<b>YES</b>	<b>NO</b>
• * Conduct area scanning/mapping		
• *Coordinate with concerned government office		
• * Review barangay profile		
• * Conduct area survey		
• * Conduct interviews		
• * Process survey and interview data		
• * Conduct orientation and briefings on microfinance products and services		
• * Facilitate/Coordinate microfinance training program		
• * Assist clients in promoting their products		
• * Administer survey on enhancement of MFI products and services		
• * Orient target clients		
• *Schedule and conduct family background investigation/ CCI /BI of prospective clients		
• *Organize group/center/ cluster		
• *Orient group officers/center/ officer on their roles and responsibilities		

<b>Can I?</b>	<b>YES</b>	<b>NO</b>
• *Facilitate group /center officer meetings		
• Present scheduled topic/s		
• *Facilitate group discussion		
• *Check clients attendance		
• *Counsel clients on personal/family problem/s		
• *Issue applications for loans and other products/services		
• *Gather applications for loan and other products/services		
• *Evaluate loan applicant and /or insurance applicant/claimant		
• *Evaluate loan and /or insurance documents		
• *Prepare summary of loan applications and/or insurance		
• *Recommend qualified loan applicants and/or insurance claimant		
• *Inform clients about loan application and/or insurance status		
• *Check loan utilization		
• *Receive collection reports		
• *Receive payments		
• *Sign repayment schedule		
• *Record collection on group treasurer's register		
• *Record collection on clients passbook		
• *Record collection on loan officer's register		
• *Consolidate total collection		
• *Issue cash receipts/official receipts		
• *Turn-over/deposit collection		
• *Investigate Reason/s for Delayed Payments		
• *Deal with delinquent members		
• *Recommend/execute plan of actions to settle delinquent account/s		
• *Submit incident report		
• *Review transaction report		
• *Prepare loan disbursement master roll		
• *Record daily collection on daily collection sheet		

• *Submit daily monitoring report		
• *Summarize collection on Loan Officer's summary book		
• *Prepare monthly plan		
• *Prepare annual development action plan		
<p>I agree to undertake assessment in the knowledge that information gathered will only be used for professional development purposes and can only be accessed by concerned assessment personnel and my manager/supervisor.</p>		
<b>Candidate's Name:</b>	<b>Date:</b>	