

CURRICULUM VITAE

1. NAME

Name: Helena van Zyl
Present Position: Director: Business School, UFS

2. FULL TIME

3. EDUCATIONAL BACKGROUND

Degrees obtained: University of the Orange Free State:

1980: B.Com. (Economics, Business Economics, Money and Banking)
1981: B.Com. Honours. (Money and Banking) *cum laude*
1982: M.Com. (Money and Banking) *cum laude*
1988: D.Com. (Money and Banking) with a thesis titled: *An evaluation of the financial role and financial facilities of the International Monetary Fund.*

4. AREAS OF ASSIGNED TEACHING RESPONSIBILITY

4.1 Formal teaching

GEB 314	-	Introduction to Investment Management International Finance
GEB 324	-	Bank Management
GEB 603/703	-	Investment Management
GEB 604/704	-	Bank Management
GEB 607/707	-	Derivative Markets
MMB 748	-	Investment and Portfolio Analysis

4.2 Informal teaching

Lectured in courses given for the Management Development Program (MDP) and the Advanced Management Program (AMP)

4.3 Other

2011: Lectured at the University of Turin, Italy (Stock Markets)

5. NUMBER OF THESES/DISSERTATIONS/RESEARCH REPORT SUPERVISED

5.1 Mini dissertations

Study guidance covering a wide spectrum of subjects to several honors and master's degree students since 1982.



5.2 Masters' Dissertations

Co-supervisor

1991

Schulz, C.R. *An investigation into the short term value of technical analysis as forecasting technique of share price movements in South African companies.*

Supervisor

1991

Keyser, H.K. *A risk analysis of commodity futures contracts using the Capital Asset Pricing Model with special reference to maize.* (Recipient of Founder's Medal of the Economic Society of South Africa for best master's dissertation.)

1994

Keogh, W.J. *The stability of beta and the usability of the Capital Asset Pricing Model in the South African context.*

1998

Lourens, C. *Banks and regulators: the determination and regulation of market risk.* (Joint recipient of Founder's Medal of the Economic Society of South Africa for best master's dissertation.)

5.3 PhD

Promoter/Supervisor

1994

Keyser, H.K. *An analysis of commodity option strategies using the Black Commodity Model with specific reference to maize.*

2002

De Beer, J.A. *The impact of the proposed new capital adequacy framework on credit risk management practices of South African banks.*

2003

Mostert, J.W. *Problems relating to bank regulation.*

2004

Pawley, M.G. *Mean-Variance Optimisation, Stochastic Simulation Modelling and Passive Formula Strategies for Equity Investments.*

2010

Coetzee, J. *Relationship banking in a client-centric context.*

2011

Mburu, P. *Determinants of customer satisfaction and retention: A survey of the banking industry in Kenya (NMMU).*

Co-promoter

2009

Botha, M. *A portfolio approach to improving market and credit risk management.*



6. TEACHING EXPERIENCE

1 January 1982	-	Appointment as junior lecturer in the Department of Money and Banking, UOFS.
1 July 1983	-	Promoted to lecturer.
1 January 1989	-	Promoted to senior lecturer.
1 July 1995	-	Promoted to associate professor.
1 January 2000	-	Promoted to full professor.
1 September 2001	-	Appointment as Director: UFS Business School

7. OTHER ACADEMIC CONTRIBUTIONS AND INVOLVEMENT

7.1 Addresses delivered

Popular:

21 April 1983:	<i>The exchange rate policy in South Africa</i> , Bankers' refresher course, Bloemfontein.
11 June 1986:	<i>The international economic climate</i> , Unit for Small Business Development (EKSO), Bloemfontein.
5 October 1989:	<i>Investment possibilities for the 1990's</i> , Unit for Small Business Development (EKSO), Bloemfontein.
2 October 1990:	<i>Woman and her budget</i> , Unit for Small Business Development (EKSO) Woman's Day, Bloemfontein.
15 February 1991:	<i>The farmer and his wife's involvement in the financial provision of their workers</i> , Clocolan.
11 February 1991:	<i>Financial planning for the individual</i> , Ladybrand.
16 February 1994:	<i>Retirement planning</i> , Telkom, Bloemfontein.
15 August 1994:	<i>A new Stock Exchange</i> , Raadzaal Rotarians, Bloemfontein.
12 November 1994:	<i>The South African Economy</i> , Profsen Laboratory, Kimberley.
27 February 1995:	<i>Investment alternatives</i> , Sentra-Oes, Ficksburg (in collaboration with ABSA Bank).
29 March 1995:	<i>Retirement planning</i> , Telkom, Kimberley.
26 November 1996:	<i>Financial planning</i> , NG Church, Bloemfontein.
27 May 1997:	<i>Financial planning</i> , NG Church, Bloemfontein.
24 July 1997:	<i>Investments in unit trusts</i> , ABSA Women's Forum, Bloemfontein.
22 October 1997:	<i>Invest your money well</i> , Business Woman 2000, Bloemfontein.
16 July 1998:	<i>Opportunities and challenges for the business woman</i> , Business Woman 2000, Bloemfontein.
8 September 1999:	<i>Financial planning for the new millennium</i> , Medical Women's Club, Bloemfontein.
9 September 2000:	<i>Financial Planning</i> , Dutch Reformed Church, Langenhovenpark, Bloemfontein.
5 October 2000:	<i>The woman and financial planning</i> , Jeneka vWomen's Organisation, Kimberley.
17 March 2001:	<i>The woman and financial planning</i> , Reformed Church, Reddersburg.
5 November 2002:	<i>The current investment environment</i> , FPI Meeting, Bloemfontein.
27 February 2004:	<i>The current investment environment</i> , FPI Meeting, Bloemfontein.
4 May 2006:	<i>Current economic challenges – international and SA</i> , SARS Filing Season Launch 2006, Bloemfontein.

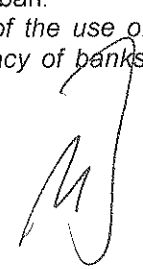


Popular scientific:

- 28 September 1990: *Investment opportunities for the individual*, HSRC, Cape Town.
- 27 September 1995: Risk management; Institute of Bankers -Bloemfontein branch, Bloemfontein.
- 18 October 1995: *Risk management*, Standard Bank - Senior Managers, Bloemfontein.
- 21 May 1997: *Rationalisation in the banking industry*, Institute of Bankers - Bloemfontein branch, Bloemfontein.
- 10 March 1999: *Economic perspectives on South Africa*, Institute of Estate Agents, Bloemfontein.
- 13 April 1999: *Measuring risk*, Synod Office - NG Church, Bloemfontein.
- 17 March 2000: *Investment Opportunities in 2000*, Sanlam Unit Trusts, Bloemfontein.
- 23 March 2000: *Investment Opportunities in 2000*, Bloemfontein Rotary Club.
- 20 October 2000: *The economy: national and international*, Sanlam Unit Trusts, Bloemfontein.
- 27 March 2001: *International investment opportunities*, WAU Circle Meeting, Smithfield.
- 27 November 2001: *Macroeconomic implications of 11 September*, The Premier's Economic Advisory Council Strategic Planning Workshop, Bloemfontein.

Scientific:

- 28 November 1988: *The various contributions of private financing and official financing to the international debt crisis*, EBM Research Conference, Stellenbosch.
- 3 October 1991: *The role of political considerations within the functioning of the International Monetary Fund:*
Two-yearly conference: Economic Society of South Africa, Stellenbosch.
- 2 July 1996: *Risk management - a challenge for South African commercial banks*, Annual Congress, the South African Institute of Management Scientists, Grahamstown.
- 3 June 1997: *The strategic importance of ethical considerations in the banking industry*, Annual Congress, the South African Institute for Management Scientists, Pietermaritzburg.
- 2 November 2000: *The importance of financial stability for foreign investment in emerging economies*, The South African Institute for Management Scientists, Pretoria.
- 20 June 2001: *A comparison between contact and online learning (C- and E-learning): The experience of the University of the Free State*, EBINEB, Nice, France.
- 17 March 2002: - and Pretorius, A. *Globalization and Income Distribution: The South African Experience*, Warwick, England.
- 19 June 2002: - and Crous, M. J. *Breaking Boundaries for E-Learning in Africa*, EDINEB, Guadalajara, Mexico.
- 22 June 2005: *The Bachelor in Management Leadership - A First of its kind in South Africa*, Eden, Helsinki, Finland.
- 7-9 September 2005:- and Pawley, M.G. *Resampled Mean-Variance Optimisation and the Dynamic Nature of Markets*, Biennial Conference of the Economic Society of South Africa, Durban.
- 6-9 October 2005: - and Mostert, J.W. *A critical evaluation of the use of credit ratings in determining the capital adequacy of banks*, IAES Conference, New York.



- 28 October 2005: *The BML: A first of its kind in South Africa*, Multi-disciplinary research seminar: Faculty of Management Sciences, Central University of Technology, Free State.
- 4 October 2007: *Skills shortages in SA: Realities and challenges*, 3rd Annual Conference of the South African Institute of Health Care Managers (SAICHM), Kopanong Hotel and Conference Centre, Gauteng.
- 18 June 2008: - and L. Massyn. *A learning adventure and growth opportunity for adult learners*. EABR and TLC conference, Rothenburg ob der Tauber, Germany.

Lectures:

- 11 December 2000: *The importance of financial stability for foreign investment in emerging economies* (on invitation), Institute for Advanced Studies, Vienna, Austria.
- 15 March 2005: *The South African economy: Performance, realities and challenges* (on invitation), HES, Amsterdam, The Netherlands.
- April 2011 and February 2012: *Stock markets* (50% of the module), University of Turin, Turin, Italy

International Visits:

- 12 June - 15 July 2000: Kellstadt Graduate School of Business, DePaul University, Chicago, USA.
- 13 - 28 February 2002: Kellstadt Graduate School of Business, DePaul University, Chicago, USA.
ESC-Groupe Rennes, France.
Hogeschool Brabant, Breda, the Netherlands.
- 7 - 11 April 2003: International School of Business, Robert Schuman University, Strasbourg, France.
International School of Business, ESC Groupe, Rennes, France.
- 20 - 26 September 2003: MBA Study Tour, Switzerland, Germany and France.
HES, Amsterdam, The Netherlands.
- 1 - 15 March 2004: FHS, Wiener Neustadt, Austria.
FHS, Kufstein, Austria.
Haagse Hogeschool, The Hague, The Netherlands.
HES, Amsterdam, The Netherlands.
- 25 Sept – 2 Oct 2004: MBA Study Tour, Germany and France.
- 15 – 21 January 2005: MBA Study Tour, Gurgaon, India.
- 11 – 18 March 2005: Haagse Hogeschool, The Hague, The Netherlands.
- 12 – 19 August 2005: Deakin Business School, Melbourne, Australia and Queensland University of Technology, Brisbane, Australia.
- 23 Sept – 1 Oct 2006: MBA Study Tour, Germany and France.
- 12 – 23 Febr 2007: Kellstadt Graduate School of Business, DePaul University, Chicago, USA
University of Texas at Austin, Austin, USA
- 23 March – 1 April 2007: MBA Study Tour, Malaysia and Japan.
- 9 May – 16 May 2008: Kellstadt Graduate School of Business, DePaul University, Chicago, USA
Mississippi State University, Starkville, Mississippi, USA
- 26 Sept-2 Oct 2009: MBA study Tour, Italy



8. MEMBERSHIP OF ORGANISATIONS

8.1 National

Member of the Economic Society of South Africa.
Member of the Economic Teachers Association.
Member of the Economic History Society of Southern Africa.
Member of the South African Institute for Management Scientists.

9. PUBLICATIONS

9.1 Accredited Academic Journals

- 1989: The various contributions of private financing and official financing to the international debt crisis, *EBM Research publication*, Stellenbosch.
- 1990: The IMF and private banks, involvement in the international debt crisis: solution or cause. *Acta Academica*. March.
- 1990: The funding problem of the International Monetary Fund. *SA Journal of Economics*, September.
- 1991: The International Monetary Fund's financial involvement in the rises in the price of oil. *SA Journal of Economic and Management Sciences*, April.
- 1993: The role of political considerations in the functioning of the International Monetary Fund. *SA Journal of Economic and Management Sciences*, vol. 10.
- 1994: An historical perspective on the changing role of the International Monetary Fund. *South African Journal of Economic History*. March.
- 1997: The controversial nature of the conditionality principle of the International Monetary Fund (IMF). *SA Tydskrif vir Geesteswetenskappe*. March.
- 1999: - & Crous, M. J. The strategic importance of ethical considerations in banking. *Management Dynamics: contemporary research*. Autumn, vol.8, no. 2.
- 2012: - & Coetzee, J. and Tait, M. Selection criteria in the South African retail banking sector. *Journal of Business Management*, vol 10, no 41
- 2012: - & Strydom, D.B. and Willemse, B.J. Factors effecting longer term farm contracts in the frozen fries processing industry. *African Journal of Agricultural Research*. Vol 7, nr. 37
- 2012: - & Strydom, D.B., Terblanche, L. and Willemse, B.J. Recuction of transaction cost within the processing industry. *African Journal of Agricultural Research*. Vol. 7, nor 47.
- 2013: - & Coetzee, J. and Tait, M. Perceptions of service quality by clients and contact personnel in the South African Retail Banking Sector. *African Journal of Business Management*. Forthcoming.

9.2 Refereed Academic Journals

- 2002: The importance of financial stability for capital flows to emerging economies referring to the African continent and South Africa. *Pakistan Journal of Applied Sciences*, vol 2, no 1.
- 2008: - & Massyn, L. Integrated assessment: A learning adventure and growth opportunities for adult learners. *American Journal of Business Education*, vol.1, no. 2,

9.3 Popular-scientific

- 1988: A few problematic aspects of the International Monetary Fund's organisational structure. *Ekonomie/Economics*, Winter.
- 1990: Introduction to futures contracts and -markets. *Ekonomie/Economics*, Summer.



9.4 Reviews

- 1988: A review of De Vries, M.G. Balance of payments adjustment, 1945-1986: The IMF experience, Washington: IMF, in *SA Journal of Economics*, September 1987.
- 1988: A review of Martirena-Mantell, A.M. (ed.) External debt, savings and growth in Latin America. Washington, D.C.: IMF, in *SA Journal of Economics*, December 1987.
- 1991: A review of Sijben, J.J. (ed.) *Financing the world economy in the nineties*. Dordrecht, Boston: Kluwer Academic Publishers, in *Southern Economic Journal* (USA), July 1991.
- 1993: A review of Helleiner, G.K. *The new global economy and the developing countries: essays in international economics and development*. Hants. U.K.: Edward Elgar, in *Southern Economic Journal* (USA), January 1993.
- 1994: A review of Milner, C. and Snowden, N. (eds.) *External imbalance and policy constraints in the 1990's*. New York: St. Martin's Press, in *Southern Economic Journal* (USA), April.

9.5 Referee / Reviewer

- 1991: The historical development of financial futures markets: 600 to the late 1980's. *Ekonomie/Economics*. March.
- 1991: Monetary policy and housing: implications for 'n post-apartheid South Africa. *Acta Academica*.
- 1993: The ethics of futures markets. *Koers* (PU for CHO).
- 1993: A comparison of the Mundell-Fleming, monetary and portfolio approaches to exchange rate determination. *Ekonomie/Economics*.
- 1994: An analysis of the (BEO's) Bureau for Economic Research's South African consumer confidence index for black and white consumers: 1982-1992. *Ekonomie/Economics*.
- 1997: SA bank regulation and the informal banking sector. *Management Dynamics*.
- 2000: South African SME exports to SADC: Empirical analysis of obstacles. *Management Dynamics: contemporary research*.
- 2007: The service quality of the PUK Rugby Institute. *Journal of Humanities/Tydskrif vir Geesteswetenskappe*.
- 2008: Corporate art collections in South Africa: An investigation into purpose and function. *South African Journal of Business Management*.
- 2008: The cost of banking services and the technical efficiency of a SA bank. *The Journal for Transdisciplinary Research in Southern Africa*.

9.6 Books

- 2005: "The BML – a first of its kind in South Africa: a new learning adventure for adult workers" in *Brain-based Executive Education*, Jocelin Kagan (ed), Johannesburg: Knowres Publishing, pp. 207 – 213.

9.7 Other

- 2000: Two contributions for SA Encyclopedia, Naspers.

10. RESEARCH

- 10.1 1988: The international debt problem with special reference to the roles of the IMF and private banks.
- 10.2 1990: The role of politics in the decision-making process of the IMF.
- 10.3 1994: Ethics in banking.



10.4 1998: The impact of financial regulation on globalisation.

11. EXTERNAL EXAMINER

1992-1999: Vista University -. Monetary Economics (Hons.).
1995: Potchefstroom University for CHO (Masters' degree dissertation).
1996: - University of Kwazulu Natal (Pietermaritzburg). Bank Management.
1998: Potchefstroom University for CHO (PhD thesis).
1999: Potchefstroom University for CHO (Masters' degree dissertation).
2009: University of Stellenbosch (PhD thesis)
2010: - NMMU. Financial Markets.
2011: University of Kwazulu Natal. (PhD thesis). C. Madondo: *How to Minimize the Liquidation of Viable Institutions in Zimbabwe's Banking Sector.*

12. INVOLVEMENT IN FACULTY AND UNIVERSITY MATTERS

1989 and 1990:

Member of the *ad hoc-committee* of inquiry into the relevancy of certain aspects of training (Faculty of Economic and Management Sciences)

1995 - 1998:

Member of the Faculty of Economic and Management Sciences Library Committee

1995 - 1998:

Representative of the Faculty of Economic and Management Sciences at meetings of the Faculty of the Humanities

1996 - 1998:

Member of Financial Committee (University of the Orange Free State)

1997 - 1998:

Task Teams: Faculty of Economic and Management Sciences

Chairperson of Task Team: Bachelor's and first degrees

Member of Task Team: Postgraduate degrees (Faculty of Economic and Management Sciences)

Member of Task Team: Management model (Faculty of Economic and Management Sciences)

1998:

Member of Programs Committee (University of the Free State)

Member of Portfolio Committee: Resources (University of the Free State)

Member of Faculty Committee (Faculty of Economic and Management Sciences)

Program Director: Private Sector Management (Faculty of Economic and Management Sciences)

1999:

Chairperson of Project Committee: Riverbend Learning Systems (for Faculty of Economic and Management Sciences).

Convenor of the Teaching Committee (Faculty of Economic and Management Sciences)



1999 - 2005:
Trustee of Pension and Provident Fund (University of the Free State)

1999:
Member of the Telematic Learning Committee (University of the Free State)

1999 - 2000:
Member of Core Committee: Turning Strategy (University of the Free State)

Convenor of the Action Group D – Counselling and Empowerment Strategy (Turning Strategy)

2000 -
Member of the Senate (University of the Free State)

2000:
Member of the Steering Committee for B.Com. and B.Sc. Actuarial Science

2000 -
Member of the Management Committee: Centre for Financial Planning Law

2001 - 2004:
Member of Task Team: Five year UFS-plan

Member of Task Team: Academic Programmes and Structures (Uniqwa)

2002 – 2004:
Member: Project Committee, Edegree

2004 –
Member: Teaching and Learning Committee, (Faculty)

2007 -
Acting Programme Director: Private Sector Management

13. OTHER

1992 - 1994:
Treasurer, Bloemfontein branch, Economic Society of South Africa

September 2001 - April 2002:
Co-opted member of the Executive Committee of CBI

2002 - 2005
Vice-president, CBI

June 2002 - December 2003
Member of the Management Committee, Free State Residential Care Centre

July 2002 -
Member of the Standing Committee for the Revision of the Banks' Act, SA Reserve Bank

2004 -
Member: Bloemfontein Chamber of Commerce and Industry



2006 -
Editorial Committee – national: *South African Journal of Business Management*

2006 - 2008
Executive member of SABSA (South African Business School Association)

2008 – 2010
Vice-president: SABSA (South African Business School Association)

2009 – Representative of the Senate to the University Council

2010 – President: SABSA (South African Business School Association)

2010 – Appointed as Director of Kemco

2011 – Judge for Imbasa Yegolide Awards (UK Pension Awards)

2010-2012
President: SABSA (South African Business School Association)

2012 - Judge for Imbasa Yegolide Awards (SA Pension Fund Awards)

2012: Auditor, Accreditation of the Business School, University of Namibia, Windhoek (Namibia), 29-30 October.

2013 - Judge for Imbasa Yegolide Awards (SA Pension Fund Awards)

14. AWARDS

2005:
A centenary medal awarded by the University of the Free State for the outstanding role as member of the turn-around team which turned around the financial position of the university and created a sustainable basis for academic growth, as well as for the pioneering role as a woman in a senior management position at the School of Management.

2007:
A management award awarded by the Alumni Society of the University of the Free State (Kovsie Alumni) for exceptional service to the university in view of the recipient's managerial role in expanding and developing the School of Management.

2008:
Best Paper Award at The 2008 EABR (Business) and TLC (Teaching) Conferences, Rothenburg ob der Tauber, Germany. (18 June 2008: - and L. Massyn. *A learning adventure and growth opportunity for adult learners*. EABR and TLC conference, Rothenburg ob der Tauber, Germany).

15. REFERENCES

Prof MJ Crous
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Prof M Kotzé
Head: Dept of Industrial Psychology, UFS
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07/05/2013

H. VAN ZIK

24/07/2013