

Job Title: Data Analyst**Reports To:** Vice President Finance**Status:** Exempt**Date:** May 2025

Position Summary: Collaborates with various CCU departments and employees to collect, manipulate, analyze, and interpret data and provide valuable reporting and analysis functions to support business decisions and strategic initiatives. Monitors the performance, security, and integrity of the credit union's databases.

Principal Duties and Responsibilities:

- Serves as the credit union's primary report writing resource. Collaborates with end-users to identify needs and provide optimal reporting solutions. Compiles data from multiple sources into accurate and valid reports.
- Develops and maintains a data warehouse, working with multiple third parties and following best industry practices.
- Ensures the data repositories produce consistent, reliable data through implementation of quality control testing and procedures.
- Analyzes data for anomalies, accuracy, and applicability to business unit requests.
- Analyzes data to uncover trends and develop key insights. Utilizes various industry tools to generate metrics and develop actionable recommendations.
- Collaborates with business users and department heads to discover uses.
- Creates and maintains documentation including requirements, design and user manuals.
- Conducts research on emerging products, services, protocols and standards in support of database enhancements and development efforts.
- Analyzes business processes and requirements.
- Prepares dashboards and other requested reports for the Board of Directors, Executive Team, CCU Managers, etc. Assists employees in interpreting data to make decisions and set goals.
- Identifies opportunities to improve processes and strategies with technology solutions. Suggests improvements as needed.
- Develops, recommends, and implements business continuity strategies and disaster recovery solutions to ensure uninterrupted access to databases.
- Supports implementation of CCU projects by planning, coordinating and managing the storage and migration of data between systems.
- Assists with other special projects as needed.
- Performs other duties as assigned.

Additional Duties and Responsibilities:

- Commits to CCU's mission, vision, and core values and model of Service Excellence. Lives and displays these values in all aspects of work and personal life.
- Keeps current in field by reading published information and attending authorized seminars and conferences. Occasional out-of-town travel.
- Maintains strong financial industry knowledge and sharp technical acumen.
- Participates in training sessions and online courses as needed.
- Gets involved in professional and/or community activities to contribute to local community/profession and to be visible in the community.
- Represents the department on committees that may be formed and/or at various CCU events.
- Other job-related duties may be necessary to carry out the responsibilities of this position.

Performance Expectations:

- Demonstrates accuracy and thoroughness and promotes this attribute to all employees.
- Effectively communicates ideas, thoughts, and concepts verbally and in written form.
- Performs all duties in compliance with CCU policies and procedures and state and federal rules and regulations.
- Is empathetic with coworkers and members. Listens to understand and treats others with respect and patience.
- Complies with Bank Secrecy Act requirements; always maintain the integrity of our confidentiality policy.

- Maintains a positive, professional appearance and attitude with members and co-workers.
- Develops and maintains positive working relationships with other employees; promotes teamwork concept.
- Maintains a neat workspace.
- Is punctual and reliable.
- Asks for help when necessary.

Knowledge, Skills, and Abilities:

- Excellent written and verbal communication skills.
- Excellent attention to detail, problem solving, and analytical skills.
- Extensive knowledge of Microsoft Windows based computer systems and Microsoft Office products.
- Ability to operate general office equipment.
- Ability to read and interpret programming language code and support applications, reports, and processes.
- Being familiar with a variety of report writing concepts, practices, and procedures is required.
- Intermediate programming skills in SQL is required.
- A post-secondary degree or certification in a related field, or an equivalent combination of education and experience.
- Related experience in financial institutions is preferred but not required.
- Intermediate data visualization development skills (Report Builder, Power BI, Tableau, etc.) preferred.

Work Relationships and Scope: Reports directly to the Vice President Finance. Due to the nature of the position, will work closely with various staff members at CCU on an occasional basis.

Working Conditions: Work is performed largely in a pleasant office environment with minimal chance of personal injury and moderate noise level. There may be occasions when the work environment is stressful. Work hours will normally be from Monday through Friday and may change depending on our needs or due to special projects, deadlines and other concerns. Weekend work may be required on an occasional basis. Physical requirements include the ability to sit or stand for extended periods of time. Some walking, bending, stooping, and lifting of light materials is required. Frequent mental and visual concentration required for computer usage. Equipment that may be used includes a copy machine, calculator, telephone, computer, fax machine, and other office and financial institution equipment. Occasional travel may be required. Reasonable accommodation may be made to enable employees with disabilities to perform the essential functions.

Acknowledgment: This position description describes the general nature and level of work performed by the individual assigned to this position and should not be interpreted as all inclusive. It does not state or imply these are the only duties and responsibilities assigned to the position. The employee may be required to perform other job-related duties. All requirements are subject to change and to possible modification to reasonably accommodate individuals with a disability.

This position description does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the position change.