

**JOB TITLE:** Data Analyst III  
**DEPARTMENT:** Credit  
**REPORTS TO:** CCO  
**FLSA STATUS:** Exempt  
**DATE PREPARED:** 03/20/2025



The Senior Data Analyst supports Pathway Lending's goals, values, and philosophy by exhibiting the following behaviors: excellence, quality service, commitment, and accountability.

**POSITION SUMMARY:**

Working under the policy direction of Pathway Lending and under the general supervision of the Chief Credit Officer, this position provides support in administrative areas. The Senior Data Analyst assists with scoping and analyzing data resulting from the various programs and services across the organization to help management monitor for efficiency and effectiveness as well as highlighting potential opportunities for growth. This position helps to prepare, coordinate, and deliver presentations, communicate key data summaries and support a variety of general business reporting needs.

**SUPERVISORY RESPONSIBILITIES:** N/A

**PRIMARY DUTIES AND RESPONSIBILITIES:**

1. Oversees all reporting functions across multiple platforms including loan operations, pipeline and portfolio management by developing and implementing data to consolidate, streamline and automate reporting processes.
2. Collaborates with Portfolio Management and Loan Operations teams to provide insights on loan performance and credit risk by analyzing borrower financial data, identifying trends, and supporting portfolio risk assessments.
3. Supervises and updates Key Performance Indicators (KPIs) and provides relevant reports to assist Pathway management in performance oversight and provide alerts when meaningful deviations occur.
4. Leads data analysis from internal business units and create presentations of the same for internal meetings, Board of Directors' meetings, and external compliance reporting.
5. Research new opportunities and prepare summary reports for presentation and consideration by management.
6. Leads initiatives to improve data management, reporting automation, and analytical frameworks for enhanced business intelligence.
7. Mentors' junior analysts or other team members to build analytical skills and enhance data literacy across the organization.
8. Oversees presentations for external and internal meetings.
9. Other duties as assigned.

**QUALIFICATIONS:**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skills and/or abilities required. Ability to provide excellent customer service with clients, partners, stakeholders, and team members. A naturally curious mindset with a drive to dig into loan data, uncover underlying causes, and understand the drivers behind changes and trends. Experience with AI-powered analytics tools, machine learning models, or automation techniques for data analysis and reporting is preferred. Strong Microsoft Office skills including Adobe, and ability to navigate multiple computer systems, applications, and utilize search tools. Strong analytical skills with attention to detail and accuracy, excellent written, communication and interpersonal skills, ability to interact with all levels of the organization, ability to meet or exceed business goals and objectives, while fostering a team atmosphere. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions.

**EDUCATION AND EXPERIENCE:**

Bachelor's degree in business or finance preferred. Minimum of 3 years of experience in loan portfolio management with a strong focus on data analytics, and proven subject matter expertise in Abrigo, Salesforce, and TEA systems. Must have experience resolving and working through complex data sets, business issues and the ability to perform in a fast paced, high demand environment while balancing multiple priorities.

**OTHER SKILLS:**

Ability to communicate in English, remain in a stationary position 75% of workday, move, cognitive of job responsibilities; ability to travel if required; and ability to adapt to a changing work environment. Aligns with Pathway Lending's mission of providing clients and stakeholders with the highest level of service to facilitate their success and the economic growth of our CDFI market

**WORK ENVIRONMENT:**

Position is in an office setting that involves everyday risks or discomforts requiring normal safety precautions.  
Remote work options.

Southeast Community Capital, d/b/a Pathway Lending, is a member of LBMC Employment Partners, a professional services organization. The above statements are intended to describe the general nature and level of work being performed by individuals assigned to this position. They are not intended to be an exhaustive list of all duties, responsibilities, and skills personnel so classified. Management reserves the right to change the job duties and responsibilities.