SDAO Special Districts Association of Oregon

POSITION DESCRIPTION

Special Districts Association of Oregon believes that each employee makes a significant contribution to our success. That contribution should not be limited by the assigned responsibilities. Therefore, this position description is designed to outline primary duties, qualifications, and job scope, but not limit the incumbent nor the organization to only the work identified. It is expected that each employee will offer his/her services wherever and whenever necessary to ensure the success of SDAO Advisory Services.

Title: Public Finance Associate
Department: Administration
Exempt/Non-Exempt: Exempt
Reports To: Director of Advisory Services
Pay Equity Group: 4357762655113
Effective Date: July 2026

x New position ☐ Position change ☐ Updated with annual evaluation

---

General Position Summary:
The Public Finance Associate is a key support role in the public sector's financing process, bridging financial analysis with regulatory compliance and project execution to help municipalities and public agencies secure and manage funding and budgets effectively.

The Public Finance Associate supports the origination, structuring, and execution of debt financing for public sector entities such as municipalities, school districts, and special districts. The role blends financial analysis, regulatory compliance, and project coordination to help the Director of Advisory Services secure funding for infrastructure, utilities, housing, and other municipal initiatives.

Essential Functions/Major Assignments:

- **Financial Documentation & Analysis**: Prepare, organize, and create detailed financial documents and analyses for municipal debt issues, budgets including annual continuing disclosure filings.
- **Debt Lifecycle Support**: Assist from preliminary data gathering through closing, including preparing financing calendars, distribution (interest parties) list, term sheets, and closing memos.
- **Data Management**: Input and verify debt repayment details, run financing options in systems like MUNEX, Adjage and Excel, and populate/review data tables for accuracy.
- **Offering Process**: Coordinate preparation of RFPs, presentations, and correspondence; attend governmental meetings and presentations as needed.
- **Project Analysis**: Gather and interpret financial data, and conduct comprehensive project analyses, including bond ratings and insurance assessments
- **Regulatory Compliance**: Follow all regulatory rules and internal procedures, ensuring filings and disclosures meet legal and reporting standards.
- **Collaboration**: Work closely with senior municipal advisors, public officials, and internal teams to present findings and recommendations.

Typical Work Context

- **Clients**: Local governments, school districts, special districts, and public agencies.

- **Services**: Municipal bond issuance, cash flow analysis, budget process, bond proceeds management, and public finance advisory.
- **Tools**: Financial modeling software, Excel, MUNEX, Adjage and other disclosure/reporting platforms.

Secondary Functions:

- Required to attend various activities, meetings, and/or events;
- All other duties as assigned

Job Scope:

- The position functions with virtual autonomy with the Directory of Advisory services providing oversight on an as needed basis.
- Planning processes typically impact more than one function; Planning is more difficult because of the number of alternatives or obstacles to successful completion of planned work. Plans must have long term view of impact or results.
- Regular need to design and develop multiple program functions and related processes and procedures.
- Utilization of resources from other work units is often required to perform the job's functions. There is some opportunity to significantly impact the organization's services.

Supervisory Responsibility:

- None.

Interpersonal Contacts:

- There is frequent communication both inside and outside the organization to communicate organizational direction, processes, guidance, etc.

Specific Job Knowledge, Skill and Ability:

- Strong analytical and written communication skills
- Attention to detail
- Regulatory knowledge
- Ability to manage multiple projects under supervision.
- Must possess integrity, commitment, and performance
- Ability to work with public officials and stakeholders.
- Must possess and perform multiple, technical tasks with a need to periodically upgrade skills in order to meet changing job conditions.
- Knowledge of required of State and Federal laws and regulations and State Administrative Rules pertaining to areas of public finance and the issuance of indebtedness.
- Specialized knowledge of the municipal advisory rules promulgated by the Wall Street Corruption and Consumer Protection Act of 2010 ("Dodd-Frank Act").
- Must be able to work independently and work with others in a wide variety of circumstances; analyze data utilizing a variety of complex processes
- Must be able to work independently under broad organizational guidelines to achieve unit objectives.
- Independent problem solving is required to analyze issues and create action plans.
- Problem solving with data requires analysis based on organizational objectives
- Must have ability to adapt to changing work priorities while consistently meeting deadlines
- Proficient understanding of Microsoft applications and specialized financial analytic software and applications
- Must be available and accessible during work hours

Specific Job Effort:

- This position is subject to ongoing shifts in priority and demands that require the need for review and integration of diversified functions and interests.

Education, Experience, and Certification/Licensure:
Required

- Bachelor's degree in business administration, accounting, finance, public administration, or closely related field.
- Minimum of two years in public finance, municipal finance, accounting or related financial services; familiarity with bond markets and public sector funding.
- Municipal Securities Rulemaking Board ("MSRB") - Passing the Series 50 Examination will be required as well has registration with the Securities and Exchange Commission and the MSRB.
  OR
- An equivalent combination of education, training, and experience sufficient to successfully perform the essential duties of the job will be considered

Desired

- Master's degree in business administration, accounting, finance, public administration, or closely related field
- Experience working within the public sector in a position related to financial and debt management
- Experience with budgeting and accounting of governmental entities.

Job Conditions:

- Routinely uses standard office equipment, especially computers and mobile devices
- This position is eligible to work entirely from a home office and/or is eligible to work a hybrid schedule of in office/work from home as per current policy.
- In performance of the duties of this job, the employee is occasionally required to stand; walk; sit; use hands and fingers to handle, or feel objects, tools or controls; reach with hands and arms; climb stairs; talk or hear; and drive an automobile.
- The employee must occasionally lift or move office products and supplies, up to 20 pounds.
- This position requires travel (including overnight).
- Typical work schedule is Monday through Friday during regular business hours though must meet demands and requirements to best service district members which may mean working hours outside of regular office hours.

Appointees will be subject to completion of a standard probationary period.

The essential physical abilities described here are representative of those an employee may encounter while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The above statements are intended to describe the general nature and level of work being performed by employees assigned to this classification. They are not intended to be construed as an exhaustive list of all responsibilities, duties and/or skill required of all personnel so classified. This job description is not an employment agreement and/or an expressed or implied employment contract. Management has the exclusive right to alter this job description at any time without notice.

This is a reasonable but not inclusive description of the essential functions of my position.

Employee Signature Date ______________
(*The signature of the employee indicates this document has been read and is understood.)*

Supervisory Approval Date

(The signature of the Supervisor confirms the assignment of work to the employee.)