

# FIRST PARTNER HANDBOOK



Office of the Governor

September 2024

## Table of Contents

SECTION	PAGE
Introduction	3
History of the First Partner	4
Dignitary Protection Unit	5
Governor’s Residence – Mahonia Hall	6
Oregon’s First Partner	7
Staff and Office Operations for the First Partner	12
Human Resources and the First Partner	14
Other Resources	16

## **Introduction**

The Oregon First Partner Handbook is intended to provide basic guidance to a new Governor and their spouse or domestic partner upon taking office and serve as a resource to Governors and their families, staff, and the public at large.

According to the National Governors Association, Governors and their spouses/partners are both viewed as public officials. Each Governor's spouse/partner may define their unique public role and decide how to best serve the Governor's priorities.

Oregon law defines a First Partner as a "public official," however Oregon statute provides only minimal guidance to Governors and their families about the role of the First Partner. This handbook contains all available guidance from Oregon statute and the Oregon Government Ethics Commission.

## History of the First Partner

Historically, the First Partner has been considered an official ambassador for the State. In the long history of First Ladies in the White House, across the nation, and here in Oregon, First Partners have also been known to pick up the mantle of advocacy and service for any number of issues: Betty Ford’s outspoken support for women’s rights and access to medical and mental health treatment, ultimately leading to the creation of the Betty Ford Foundation; Laura Bush’s promotion of reading, literacy, and libraries; and Michelle Obama’s push for healthy habits with her “Let’s Move” program.

Closer to home, First Lady Audrey McCall (1967-1975) was known as an active and influential presence in Oregon politics, both during her husband’s term and after. First Lady Dolores Atiyeh (1979-1987) was a known healthcare advocate whose lobbying was instrumental in the passage of mandatory seat belts, as well as vaccines, for children. First Husband Frank Roberts (1991-1993) was a State Senator when Governor Barbara Roberts began her service as Oregon’s first woman governor. First Lady Sharon Kitzhaber (1995-2003) was the founder and honorary chairwoman of the Oregon Safe Kids Coalition and she fundraised for and guided an important remodel of Mahonia Hall. First Lady Mary Oberst (2003-2011) led the capital campaign for the restoration of the Kam Wah Chung Museum in John Day and lent her support to the creation of Oregon’s Main Street Program, among other projects.

Each First Partner has their own choices to make when it comes to how involved they may choose to be during their partner’s tenure as Governor. As the highest public office in the state, the Governor, the First Partner, and Governor’s Office are held to the highest standards of accountability and ethics. The role of a First Partner in a Governor’s administration is a unique one that has inherent value to the work of a Governor. It is also defined by statute, ethical best practices, and public perception. The First Partner has a public profile unlike any other that gives them a unique voice on issues affecting their state.

## **Dignitary Protection Unit**

The Dignitary Protection Unit (DPU), a division of the Oregon State Police, provides security and protection to the Governor and the First Family. DPU provides security at the residence, during travel, and at events, including advancing events, to ensure the safety of the First Family.

The First Partner is supported by DPU in their role as a public official representing the Governor.

### ***Dignitary Protection Unit Mission:***

*Our responsibility is to protect the First Spouse/Partner and immediate family from threats of:*

- *Intentional or unintentional injury or harm*
- *Harassment and menacing*
- *Stalking*
- *Kidnapping and assassination*

*DPU conducts ongoing risk and threat assessment to identify any need for direct security protection. When a risk or threat has been identified, DPU will ensure that the First Spouse/Partner or family member(s) are able to go about their business, whether personal or professional, without fear of injury, harm or attack due to that risk or threat.*

*Additionally, DPU is responsible for investigating all threats and concerning communications made towards the First Spouse/Partner and immediate family.*

## **Governor's Residence – Mahonia Hall**

The Department of Administrative Services (DAS) is the central management and service agency of state government. DAS owns and operates Mahonia Hall as part of the statewide real property asset portfolio. DAS budgets for and maintains the residence in alignment with other state building standards and codes. The legislature is responsible for allocating resources for the maintenance and upkeep of the building.

Traditionally, the First Partner has been the primary liaison with DAS to coordinate the First Family's needs with regard to management, maintenance, and event coordination at Mahonia.

### ***Brief History of the Residence***

Mahonia Hall is a Tudor style home located in the Fairmont Hill neighborhood overlooking Salem.

Originally the home of Thomas "Hop King" Livesley and Edna Livesley, the house was built in 1924. The home was originally designed by Ellis F. Lawrence, the founder of the University of Oregon School of Architecture, to accommodate formal entertaining. Lawrence also designed other classic Salem structures such as the Elsinore Theater, Elks Club, and Masonic Building, now called the Franklin Building.

In 1987, a committee of citizens raised \$1.5 million in donations to purchase and refurbish the residence. When completed, the house was donated to the State of Oregon to become the official Governor's residence, with DAS given the responsibility for the maintenance and upkeep.

In 1988, a contest was held for local school children to name the newly acquired Governor's house. Mahonia, another name for Oregon Grape (Oregon's state flower) was selected.

In 1990, the State Historic Preservation Office applied for Historic Landmark status and on April 26, 1990, the U.S. Parks Department formally issued the Historic Landmark designation for Mahonia Hall.

## Oregon's First Partner

As a public official, each First Partner (spouse or domestic partner), in consultation with the Governor, has flexibility in determining how they want to be involved in public activities in a volunteer capacity during the Governor's term.

The Governor, First Partner, and the Governor's Office are held to the highest standards of accountability and ethics. The volunteer role of a First Partner in a Governor's administration can add value to the work of a Governor and benefit the state. It is also defined by statute and ethical best practices.

### **Relevant Statute**

In Oregon, the First Partner is defined in statute as a public official:

*ORS 244.020*

*(6) "First Partner means the spouse or domestic partner of the Governor, or an individual who primarily has a personal relationship with the Governor as determined by the Oregon Government Ethics Commission by rule. "First Partner" encompasses any alternative title that the Governor may publicly substitute for "First Partner" including, but not limited to, "First Lady," "First Husband" or "First Spouse."*

*(15) "Public official" means the First Partner and any person who, when an alleged violation of this chapter occurs, is serving the State of Oregon or any of its political subdivisions or any other public body as defined in ORS 174.109 as an elected official, appointed official, employee or agent, irrespective of whether the person is compensated for the services.*

Like all public officials, the First Partner is subject to all requirements of Oregon public officials, such as prohibitions on the use of public office to obtain personal financial gain (ORS 244.040), duties regarding actual and potential conflict of interest (ORS 244.120), and prohibitions on nepotism (ORS 244.175-ORS 244.179). The First Partner files an annual Statement of Economic Interest with the Oregon Government Ethics Commission, (ORS 244.050).

It is recommended that the Governor, First Partner, and the Governor's Chief of Staff meet with legal counsel to clarify any questions that may arise during the time of service.

## **Public Records Law**

In Oregon, “every person has a right to inspect any public record of a public body in this state....” (ORS 192.314 ). This applies to Oregon’s First Partner and includes all communications pertaining to state business.

The First Partner should conduct official business with state equipment, such as using a state email account and a state cell phone.

Thorough public records training is required by Executive Branch employees and volunteers and should be a part of any onboarding training for the First Partner upon receiving a state email address, calendar, and electronic devices, and once per biennium thereafter.

It is recommended that public record requirements be an ongoing topic of conversation with the First Family and advisors, including the Governor’s legal counsel, with case specific clarifications encouraged at any time.

## **Being a Public Official**

The provisions of Oregon’s government ethics law guide the decisions or actions of a public official. The restrictions placed on public officials are different from those placed on private citizens because service in a public office is a public trust and the provisions in ORS Chapter 244 were enacted to provide one safeguard for that trust.

Public officials are held personally responsible for complying with the provisions of Oregon’s government ethics law. This means that each public official must follow the law, including such things as gift limits, disclosing conflicts of interest, and any employment of relatives or household members.

A complete [OGEC Guide for Public Officials](#) can be found on the OGEC website.

## **Ethical Code of Conduct**

From the [OGEC Public Officials webpage](#):

*In the conduct of my official duties as a public official, I will act ethically when I:*

- *Uphold the public trust by safeguarding the public money and resources*
- *Behave in an open, honest, and transparent manner*
- *Conduct the public’s business fairly and objectively*
- *Disclose financial conflicts of interest*
- *Do not use my public position for personal gain*
- *Observe limits on the receipt of gifts*

## **Oregon Government Ethics Guidance Specific to the First Partner**



The following is guidance provided by the Oregon Government Ethics Commission to the Office of the Governor in 2024:

*Excerpt: Advice No. 24-170I. [See full text here.](#)*

Question 1: ORS 244.020(6) defines the "First Partner" as "the spouse or domestic partner of the Governor" and encompasses alternative titles such as "First Lady," "First Husband" or "First Spouse." The "First Partner" is a "public official." ORS 244.020(15). May the First Partner, as a public official, participate in the development of, advise on, and/or promote the Governor's priorities, consistent with the ethical duties required of public officials in ORS Chapter 244?

Answer 1: It is possible for the First Partner, as a public official, to participate in the development of, advise on, and/or promote the Governor's priorities, consistent with the ethical duties required of public officials in ORS Chapter 244. It is not within the Commission's jurisdiction to opine on whether the Governor's Office can create an Office of the First Spouse or establish official duties for the First Partner. Whether the Governor's Office creates an Office of the First Spouse or not, the Governor's spouse is the First Partner and is a public official as a matter of law, based on their relationship status to the Governor. [ORS 244.020(6); ORS 244.020(15)]. As a public official, the First Partner is subject to compliance with the laws in ORS Chapter 244. For the First Partner, this includes, but is not limited to:

- **Conflicts of Interest:** Any time the First Partner participates, as a public official, in making a decision or recommendation, or taking action on a matter, if that decision, recommendation, or action would or could have a financial impact, positive or negative, on the First Partner, on her relatives, or on any businesses with which she or her relatives are associated, then she would be met with a conflict of interest requiring compliance with ORS 244.120. [ORS 244.020(1) and (13); ORS 244.120]. As a volunteer working in the Governor's Office, the First Partner would be subject to the conflict of interest disclosure requirements in ORS 244.120(1)(c). When met with a conflict of interest, the First Partner would need to submit a written disclosure of the nature of the conflict of interest to her appointing authority. The appointing authority could then assign the matter to another employee or direct the First Partner to handle the matter in a specified manner. [ORS 244.120(1)(c)].
- **Prohibited Use of Office:** The First Partner may not use or attempt to use her position to obtain a financial gain or avoid a financial detriment, for herself, her relatives or household members, or any businesses with which she or they are associated, if that financial gain or avoidance of detriment would not otherwise be available but for holding her position as a public official. [ORS

244.040]. Both the conflicts of interest and prohibited use of office statutes use the term "business with which associated." Whether a business qualifies as a business with which a person is associated depends on the type of business (private business or closely held corporation versus publicly held corporation) and the person's connection to the business (owner, officer or director, versus employee or agent), as well as whether they own or have owned, in the preceding calendar year, stock, stock options, equity interests, or debt instruments in the business. [ORS 244.020(3)]. Additionally, for public officials, such as the First Partner, who are required to file an annual Statement of Economic Interest (SEI), any business listed as a source of income on their SEI qualifies as a business with which they are associated. [ORS 244.020(3)(d)].

- Gifts: The First Partner may not solicit or accept gifts in excess of \$50 in a calendar year from a source that has a legislative or administrative interest in her decisions or actions, or those of the Governor. [ORS 244.025].
- Nepotism: The First Partner may not engage in employment actions for a relative or household member and may not directly supervise a relative or household member. [ORS 244.177; ORS 244.179]. The Governor may appoint the First Partner and may supervise the First Partner only if the First Partner is appointed to a position as an unpaid volunteer. [ORS 244.177(3)(a); ORS 244.179(3)(a)].
- Statement of Economic Interest: The First Partner is required to file an Annual Certified Statement of Economic Interest (SEI). The SEI is filed every April 15 in the Commission's Electronic Filing System. [ORS 244.050(1)(i)].

None of the laws in ORS Chapter 244 authorize the First Partner to work in the Governor's Office or participate in developing, advising, and/or promoting the Governor's priorities. Such authorization would necessarily come from sources other than the Government Ethics Laws. ORS Chapter 244 does, however, regulate *how* and *if* the First Partner can use, apply, or benefit from their status as a public official. For example, ORS Chapter 244 prohibits any public official, including the First Partner, from making decisions or recommendations, or taking actions that have financial impacts on herself, her relatives or household members, or any of their associated businesses. Similarly, the First Partner is also prohibited from using or attempting to use her official position or office to obtain financial gain or avoid a financial detriment for herself, a relative, or member of her household.

Question 2: If the First Partner is performing official duties as a public official in the Governor's Office supporting the Governor's priorities, may the First Partner be supported by staff and provided other office resources necessary to perform such assigned official duties, consistent with Oregon's government ethics laws?

Answer 2: It does not violate the Government Ethics Laws for an employee, appointee, or volunteer, including the First Partner, to be provided with office space, materials, equipment, and/or staff support to enable them to perform official, authorized State duties. The Government Ethics Laws would, however, prohibit providing the First Partner with office space, materials, equipment, and/or staff to conduct non-State business, such as conducting a private consulting business. So long as the First Partner conducts official and authorized State business consistent with ORS Chapter 244, the First Partner's use of office space, materials, equipment, and/or staff is authorized under the Government Ethics Laws. Whether the Governor's Office provision of office space, materials, equipment, and staff support to the First Partner comports with other laws, outside of ORS Chapter 244, is beyond the scope of the Commission's authority and jurisdiction to determine.

Question 3: Many public officials are volunteers who serve Oregon without compensation, such as the thousands of individuals serving on state boards and commissions. The current First Partner is solely a volunteer. Given this set of facts, what other ethics considerations should we consider?

Answer 3: Generally, volunteers qualify as "public officials" under ORS Chapter 244. The First Partner, as a public official under ORS 244.020(6) and (15), should make herself aware of the requirements and restrictions in ORS Chapter 244. While these are briefly summarized above, the Oregon Government Ethics Commission has also published A Guide for Public Officials, which may be helpful to the First Partner.

## **Staff and Office Operations for the First Partner**

### ***Staff Support***

The size and role of staff assigned to support and work with the First Partner will vary based on how they choose to engage as a volunteer to support the Governor's agenda.

In 2016, according to the National Governors Association (NGA), 40 out of 51 Governor's offices had at least one personal staff member assigned to support or work with the First Spouse/Partner. In states across the country, the First Spouse/Partner's principal staff hold such titles as chief of staff, special assistant, executive or administrative assistant, senior advisor, or scheduler.

First Partners in many states work on a wide variety of initiatives that mobilize community groups and public-private partnerships in support of critical issues that complement a Governor's agenda.

According to the NGA, basic responsibilities of a First Spouse/Partner staff person might include:

- Serve as a liaison between the First Spouse/Partner and the Governor's office staff and the public.
- Coordinate the First Spouse/Partner's official schedule and official public appearances.
- Plan and execute public engagement for the First Spouse/Partner in coordination with relevant Governor's staff.
- Staff the First Spouse/Partner at local, state, and national events.
- Plan and oversee the Governor's residence events in coordination with the residence manager.
- Arrange travel and accommodations, including reimbursement documents when necessary.

### ***Staff Supervision***

As a volunteer, the First Partner does not supervise any state employees. State staff support for the First Partner are Governor's Office staff and report directly to the Chief of Staff for the Governor, or other Governor's staff as assigned.

### ***Office Processes and Protocols***

The following is a sample list of processes and protocols that have been used in the operation of staffing the First Partner:

Calendar: The First Partner's calendar is a public record and managed to ensure accuracy and retained as such. Time is the First Family's most valuable resource and attention to detail is required to successfully manage and coordinate the First Family's calendars.

Email: All email to and from the First Partner’s state email account is a public record and should be retained as such. Members of the public who wish to communicate with the First Partner may do so through a webform on the Governor’s official website. Correspondence from the form is monitored by staff for follow up.

Scheduling Requests: Requests for meetings or event invitations for the First Partner come through the Governor’s official website via a [fillable web form](#). These requests are then automatically routed to the First Partner’s scheduling inbox, which is monitored by staff for follow up.

Preparing for Events: When the First Partner is confirmed to attend a public event or official meeting, either with the Governor or independently, a briefing memo will be completed by the appropriate staff at least 48 hours in advance.

Office Space: If space is available, it is appropriate for the First Partner to have access to a workspace in the Governor’s Office to conduct official business.

### ***Biography of the First Partner***

It is recommended that the First Partner have a full and complete biography prepared for public use, including an official photo. Additionally, it can be helpful to have a shorter version of the public facing biography, as the circumstances for when a biography will be requested can vary.

## Human Resources and the First Partner

### ***Being a Volunteer***

While Oregon Revised Statute is clear that the First Partner is a public official, the First Partner is not an *employee* of the State of Oregon or any other organizational structure, nor are they themselves an elected official. The First Partner is a volunteer.

Volunteers are a critical resource for Oregon state government. There are multiple examples of functions made possible only because of the state's incredible volunteer workforce, especially all the individuals who serve on boards and commissions.

Because of the important nature of their work, the state includes volunteers in most state policies that protect and support the workforce. These policies focus on ensuring our volunteers have the same training as our paid employees. This helps to ensure all who interact with Oregon state government have the same foundations and conduct expectations as well as tools to address inappropriate behaviors. Similarly, the First Partner is expected to adhere to all employment and workplace policies while performing official duties and engaging as a volunteer in the Governor's Office.

Similarly, Governor's Office staff may have questions regarding the First Partner's perceived influence and power within the office. To address this, any official request from the First Partner to staff should be clear and consistent, and staff should have access to the Office's human resources protocols should any issue arise.

Volunteers are included in the following state workplace policies:

*10.040.01 State Employee Training*

*50.010.01 Discrimination and Harassment Free Workplace*

*50.010.02 Violence Free Workplace*

*50.010.03 Maintaining a Professional Workplace*

*50.010.05 Weapons in the Workplace*

*50.010.06 Employee Health and Wellness*

*50.090.01 Managing Improper Governmental Conduct*

The full policy of each of the above, as well as all other Statewide Human Resource Policies, can be found on [the DAS CHRO website](#).

Because of the unique role and position of the First Partner within the Governor's Office, the First Partner may have questions about how some of Oregon's employment policies apply while performing work in their official capacity. For example, without a direct supervisor, the First Partner may report directly to either the Governor's Chief of Staff, the

DAS Director, or the state’s Chief Human Resources Officer in cases of harassment, discrimination, or other human resources issues.

It is recommended for the Governor, First Partner, and the Governor’s Chief of Staff to meet with the DAS Chief Human Resources Officer (CHRO) to clarify any questions that may arise during the time of service.

***Workday***

Workday is the state’s human resources and personnel software system. The First Partner will be given a Workday account. Here they will find mandatory trainings that all Oregon employees and volunteers take on either a new-hire or annual basis. Some of the trainings provided through Workday include:

DAS – CHRO – Preventing Discrimination and Harassment

DAS – CHRO – Public Records

DAS – EIS – Information Security Training: Foundations

## Other Resources

- [National Governors Association](#)
- [NGA Governor's Spouses Page](#)
- [Western Governors' Association](#)
- [Oregon Government Ethics Commission \(OGEC\)](#)
- [OGEC Guide for Public Officials](#)