FIRST PROCEDURES MANUAL

FISCAL YEAR 2026

VERSION 5.0

DGS DEPARTMENT OF GENERAL SERVICES BUILD MAINTAIN SUSTAIN

FIRST Team Procedures Manual

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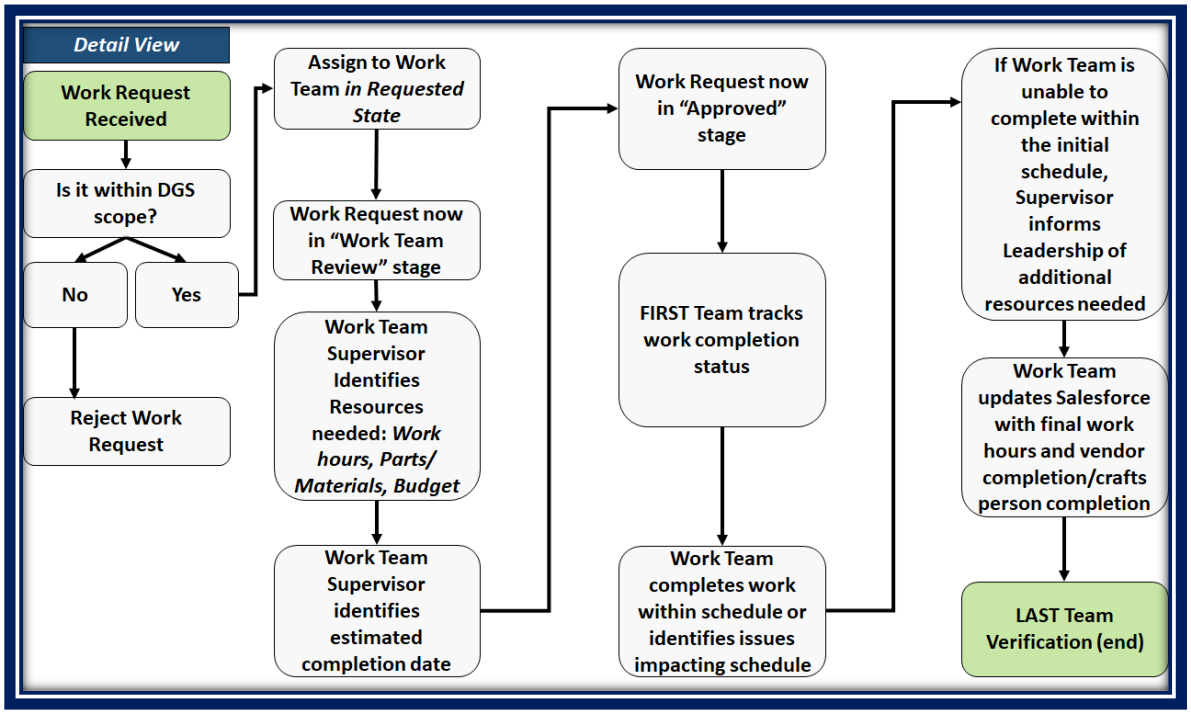
1. Introduction

The Facilities Intake Request Service Team (FIRST) is a division within the Office of the Director, Department of General Services. FIRST supports all DGS divisions by managing the work order lifecycle from request to closure. Key responsibilities include work order master data management, ensuring data integrity (e.g., cancelling duplicate work orders), reporting, data analytics, and dashboard generation. Work orders are managed in SmartDGS (Salesforce). The lifecycle includes request and approval, assignment to craftsperson or vendor, completion, verification, and closure, as illustrated below.

Figure 1: Work Order Lifecycle



FIRST team members possess comprehensive knowledge of DGS divisions and are experts in Facilities Maintenance, Capital Construction, building automation systems, data management, and property portfolio management. They are skilled in identifying:

- Appropriate work request assignment
- Typical duration and resource allocation for work requests
- Responsibility and funding sources (intra-district/MOU vs. Menu of Services)
- In-house vs. Vendor Execution
- Escalation pathways for complex issues, leveraging their in-depth understanding of DGS policies and procedures.

2. Definitions

a. **DCPS Level 1:** Work handled by DCPS Custodial Staff for unscheduled routine task.
b. **DGS In-House :** *Worked performed by DGS staff.*
c. **Work Order Already Completed**: *A work order status indicating that the task is finished, verified, and the Salesforce record is closed.*

d. **Duplicate Work Order:** *A work order that duplicates an existing request; to be rejected, related to the original, and requester notified.*
e. **Capital Project:** *A project assigned to the Capital Construction (CCD) team for execution.*
f. **Special Project:** *A project requiring ≥2 in-house staff or >4 hours, potentially involving internal/external resources or an MOU.*
    - ***Internal Special Project****: A special project executed by in-house staff only.*
    - ***External Special Project****: A special requiring vendor/contractual. Services.*
    - ***Client Approval and MOU*** *: A process for developing a Memorandum of Understanding (MOU) for funding approval.*

g. **Warranty Work:** *Work assigned to the Warranty Team for resolution under warranty terms.*

h. **Cancel Work Order:** *Cancellation of scheduled Preventative Maintenance, Routine Maintenance, or non-essential work.*
    - ***Preventative Maintenance****: Scheduled work to maintain warranties or prevent system breakdowns.*
    - ***Routine Maintenance****: Scheduled groundskeeping, mowing pest control and similar services.*

i. **Stabilization Project:** *Immediate repair of critical issues impacting operations.*

j. **Capital Projects:** *Pre-planned projects with approved budgets typically requested ≥2 years in advance.*
k. **Small Capital Projects:** *Projects funded from approved budget pools.*

Work Order Management

3. Creating a Work Order

Work Requests are received through various channels, including, email Twitter, DGS App, and "Ask the Director". The FIRST Team reviews each request to determine if it falls within DGS's scope of responsibility, defined as work on DGS property and included in the list of DGS-provided services.

The FIRST Team is responsible for approving work requests, which become work orders upon approval. Approval logs the issue in Smart DGS (Salesforce), triggering workflows based on priority:

- Emergency (24-hour SLA): immediate response
- High Priority (10-day SLA): prompt attention
- Routine Repair (45-day SLA): scheduled response

4. Schedule Maintenance

When a work request is identified as Scheduled Maintenance, the FIRST Team member shall verify the Scheduled Maintenance module for the building. This module contains specific schedule information for:

- Lawn mowing and seasonal water work
- BPO HVAC Preventative Maintenance and BPO Daily Checks (available in Salesforce)
- BPO schedules for each of the six regions, maintained by the FIRST Team.

This check ensures accurate routing and processing of work requests.

5. Duplicate Work Request Identification

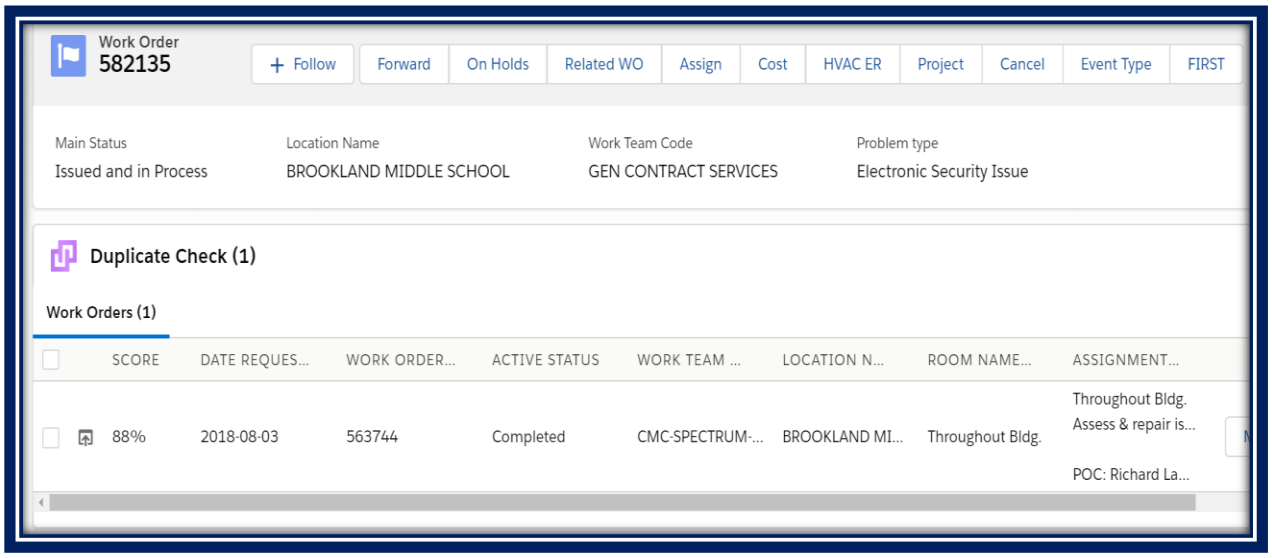
When receiving a new work request, verify the Building Name and Room Location. If these match an existing work request, review the description for consistency. If the description also matches, cancel the work request as a duplicate.

The Duplicate Check Process is performed at two stages:

1) Upon initial work request submission
2) Upon work order approval, utilizing the Duplicate Check Tool

Note: *The Duplicate Check Tool scans work orders to identify matches between Building Name, Room Location, and Work Description.*

Figure 2: Duplicate Check Tool



6. Inter-Team Work Order Transfer Process

A procedure for transferring work orders between teams. (e.g., Facilities Maintenance Team (FMT), Boiler Plant Operations (BPO), Contract Services (CS) due to factors such as funding, resources, or scope, requiring written justification via the FIRST Team Request, Effective March 2019.

FIRST Team Work Order Assignment SLA

1) Upon approval, the FIRST Team assigns work orders to a specific unit within Facilities Management Division : Facilities Management Team (FMT), Contract Services (CS), or Boiler Plant Operations (BPO).
2) For **Priority Level 1 Work Orders** ("Routine Repair"), the assigned team shall acknowledge receipt by designating a team Point of Contact within 24 hours.

7. Procedure for Executive Walkthrough

Prior to a scheduled walk-though with Mayoral, Councilmember or Agency Leadership, the FIRST Team shall undertake the following preparatory steps:

1) **Generate Salesforce Report**: Pull a current report on all open Work Orders for the subject building.
2) **Create Event**: Establish an Event in Salesforce titled “Executive Walk-Though-MM/DD/YYYY”.
3) **Update Smart DGS** (Salesforce) accordingly, ensuring data accuracy and integrity.

4) **Distribute Report:** Provide the Salesforce report link to executives attending walk-through.
5) **Initiate New Work Orders:** Create work orders as necessary based on observations and discussions during the walk-through.

8. Work Order Archiving and Retention Policy

Following Work Order closure, the work order will be archived in Salesforce for historical data reporting purposes. If a Work Order is cancelled, the FIRST Team member should provide supporting justification for the cancellation (e.g., Not DGS Responsibility, Scheduled for Maintenance, etc.). The Work Order will be retained and archived accordingly.

Work Order History shall be retained and archived for data reporting purposes. Work orders classified as "Active" (defined as being in either “Open” or “Project” status in SmartDGS) will be considered for archiving if they have remained active for a period of 18 months without significant activity. This aging period was determined based on a comprehensive review of historical work order data across multiple fiscal years.

Project & Request Processing

9. Work Request Review and Capital Assignment Protocol

Life Safety and Health Inspection Requests:

- Violations to be remedied with approved work orders shall be processed accordingly.
- Suggestions or recommendations from inspections should be noted by the Building Manager but not converted into Work Orders.

Work Request Review Process:

1) Review the Work Request against the checklist criteria.
2) Prior to cancelling a Work Order in Salesforce, confirm with the assigned team supervisor
3) If duplicates are identified via the Duplicate Check Tool, explore merge options and confirm with the team supervisor
4) If review occurs during night shift, complete research and assign to the next shift's staff.

Capital Project Assignment Method:

1) Assign the Work Order to Capital, keeping it open. If a related Capital Work Order is created, include the original work order and contact details in notifications.
2) Capital confirms eligibility and either closes the Work Order or returns it to Facilities for review.
3) Create temporary abatement work orders as needed to stabilize issues until capital project implementation.
4) Work teams identifying capital-eligible work orders transfer them to FIRST Team with cost estimations, pictures, documentation, and files. FIRST Team organizes these by agency for COO and CCD review.

Capital Turnover Process:

Prior to completing the Capital Turnover Process, notify Facilities and capture specific Fire/Life Safety components in the "Building Information" field in Salesforce. As part of the Turnover Process, a Punchlist is created to document items remaining to be done. **Note: the completion time frame is one year (1 Year) for the contractor to complete all Punchlist items. A copy of the Punchlist should be kept on file in the "Building Information" in Salesforce.**

1) Copy of the Punchlist to the FIRST Team
2) Copy of the Warranty Items to FIRST Team
3) Publishing DGS wide schedule of all turnover for 2025, 2026, etc.
4) Including FIRST Team member on Turnover Site Visits

10. Checking if a Work Request is Related to Modernization

If a school is scheduled for Modernization funded by Capital, then FIRST Team will assign the Work Order to Capital for including into project plan. Before assigning it to Capital, the FIRST Team member should confirm if the Work Order is not an active maintenance issue but properly belongs as part of a planned Modernization project.

11. Work Assigned to Capital for DCPS (To be Updated)

12. Legislative Affairs Request Management Procedure

Upon receiving a Legislative Affairs request, the following process shall be followed:

1) **Retrieve and Evaluate Request**: Retrieve the email and evaluate to determine the appropriate action.
2) **SmartDGS Check:**
   - If the request relates to an existing work order, locate the work order in SmartDGS.
   - If no existing worder exists create a new work order.

3) **Existing Work Order**: Flag the Point of Contact (POC) for situational awareness
4) **Communication and Updates**: Provide ad hoc reports, status updates, and Estimated Completion Date (ECD) as needed.

Figure 3: Legislative Request Workflow

Safety & Inspection

13. Safety Services & Intake Inquiry Guidelines

Environmental and Safety provides services and resources to the Modernization and Stabilization Program, Operations and Maintenance and Contract Services. They directly oversee the daily operations of safety and health issues and provide code enforcement to ensure DGS facilities follow federal and local regulations.

List of Safety Services

a. Asbestos/Lead Abatement Services
b. Emergency Response Management Planning
c. Fire, Safety, and Health Compliance/Enforcement
d. Hazardous Waste Disposal Services
    - Ceiling tiles
    - Fluorescent Ligh Bulbs and Tubes; and Number of boxes to be picked up
e. Incident Investigations
f. Occupational Safety Health Services
g. Pest Control Services
h. Playground Safety
i. Pre and Post Review
j. Indoor Air Quality Services
k. Universal Waste Management

Specific Questions for Safety Work Requests

- What is the specific location, and do you have a photo?
- Is the area occupied or has it been cautioned off?
- What is the best time to complete the services?
- **For DCPS:** If this is a bed bug complaint for a DCPS facility, did the Nurse contact DCPS Wellness Office to report the incident?

    - **Universal Waste and Hazard Waste** - Are containers/ drums intact? Is there spillage? Is there off-gassing or an odor involved? Is the material isolated?
    - **Odors**: Is it more intense in the am or another time? How long has this odor persisted? Is it a smoldering smell (burning smell)? Is it a wet musty smell? Does it smell like natural gas? Does it smell rotten or decaying? Are multiple spaces being affected? Is this space continuing to be utilized?
    - **Combustible gas odors**: Is smell affecting interior, exterior, or both? Strongest where? When did odor begin? Are multiple spaces being affected? Is this space continuing to be utilized?
    - **Playgrounds**: Is the apparatus sectioned or cautioned off. Is it feasible to section it off (caution tape, cones, etc.)?
    - **Asbestos**: Is suspect material damaged or intact? What type of system is in questioned (wall system, floor system, pipe insulation, etc.)?
    - **Bio:** Specialized cleaning needed. Is space routinely cleaned by building staff, or is this an additional building space without routine scheduled cleanings?

14. Work Order Initiation Based on Safety Inspection Reports

Within one day of receiving an inspection report from Office of Risk Management (ORM) or the Fire Marshall, the building manager should communicate within Salesforce the violations to be remediated. Include key details of the violation including the citation number and violation

description. Add the appropriate level of priority – Emergency, Priority, Routine Repair – so that the work order can be escalated. A FIRST Team member will review and create work orders to address violations.

Important Considerations:

- Only one (1) work order should be created for similar types of safety violation remediation. Example: If fire extinguishers need service at a building, create one (1) work order to address that safety violation.
- Standard practice should be scheduled safety maintenance programmed into Salesforce. If a work request identifies an issue that should have been addressed through the safety maintenance program, then the FIRST Team member should create a work order and relate to the scheduled maintenance program. This is like a scheduled grounds maintenance issue.
- FIRST Team added a new "Event Type" to a work order in Salesforce. Event Type can be **"Inspections."** Sub-Event Types: **DCRA, Fire Marshall, Health Code, ORM, OSHA.**
- Fire Code Violations (FCV) are generated through Fire Marshall Report and inspections. Fire Code Violation (FCV) can be entered through Work Order Management or by Environmental Safety Unit (EHS) and then approved by FIRST Team.

EHS will create a Work Order for grouped violations such as a fire extinguisher inspection or fire alarm issue, as they are referencing a building service. EHS can create a separate Work Order per specific referenced areas such as rooms and stairwells (this can be for specific services attached to the room).

EHS will enter Work Orders and assign priority based upon the Violation Abatement Management Protocol (VAMP) abatement process and agreement under Civil Action # 92-3478, Parents United vs. Marion Barry for the abatement of FEMS cited-fire code violations (FCV) and DOH cited Food Health Code violations (HCV) in DCPS.

Special Procedures

15. Bulk Trash Removal Work Request

Bulk Trash Request Procedure

- Mandatory: Include a photo and supporting documentation with the request.
- Requests without a photo will be rejected by the FIRST Team.

Salesforce Entry

- Category: Exterior > Trash and Recycling
- Include "bulk and/or illegal dumping" and details of the issue.

Point of Contact

- Susan Rileyl, Sustainability & Energy (S&E) Division
- Contracting Officer's Technical Representative (COTR) for related contracts.

16. Cancellation Process: FIRST Team Checklist

When evaluating Work Request for cancellation, follow these guidelines based on the Menu of Services categories:

Life Safety Violations

- "Violations to be remedied" require approved work orders, with processing.
- "Suggestion or recommendations" from safety/health inspections should be noted by the Building Manager but NOT converted into a Work Order.
- Other Categories: Refer to the FIRST Team Checklist (thumbtacked to employee's cubicle) for category specific criteria

Before canceling the Work Order in Salesforce:

- Contact the assigned team supervisor for conformation
- If duplicates are found vis the Duplicate Check Tool, identify merge options and confirm with team supervisor
- If reviewing during night shift, complete research and assign to next shift staff.

17. Warranty Work Orders

When a FIRST Team member determines a Work Order is eligible for a warranty repair, they should update the FIRST Team Category as "Warranty" and forward the Work Order to the "Warranty Team." FIRST Team recommends an individual dedicated to Warranty information is on the team. This individual would have expertise to research and manage work requests that may have an applicable Warranty to cover the repairs and manage the Scheduled Maintenance required to maintain the Warranty. **Note: Warranty information is sent to FMD following a building turnover. It is currently stored in a spreadsheet maintained by the Contract Services Team. These warranty documents have not yet been added to Salesforce. A "Warranty" section has been added to Building information and this needs to be populated with specific warranty services. They need to be uploaded next to the building information so that FIRST Team members can access it at the point of Intake. Refer to current version of Warranty Checklist.**

18. Related Work Orders

A related work order is used when multiple tasks or work teams are required to address a single work order. SmartDGS captures these associated work orders as a 'parent-child' structure, where the original (parent) work order is linked to any subsequent (child) work orders. FIRST Team creates a single primary Work Order based upon the initial problem description. When additional repairs are required, a related work order is generated to ensure all responsibilities are clearly assigned while maintaining a connection to the original issue.

19. Council Meeting Preparation Process

In preparation for a Council Hearing or meeting with a Councilmember, a FIRST Team member shall:

1) Generate a report from Salesforce showing current active work orders for the relevant DGS property.
2) Review the report to identify:
    - Work orders marked as "Complete" can be closed by the relevant team supervisor.
    - Duplicate Work Orders that can be closed.
3) Update Smart DGS (Salesforce) accordingly, ensuring data accuracy and integrity.
4) Provide narratives for reports, assist with Director responses, and develop responses addressing community expectations and risk factors as needed.
5) Send the updated Salesforce report to the requestor.

Systems & Communications

20. Daily SCRUM Meeting Protocol

The FIRST Team shall convene a daily meeting, known as the "Daily Scrum," to review priority work orders and operational issues. The Scrum shall be held Monday through Friday, 9:30-10:00am.

Meeting Guidelines:

- Designated team members and stakeholders shall join the designated meeting platform Monday through Friday, 9;30-10:30am.
- The SCRUM shall start by 9:30am and end by 10am, with a 30-minute maximum extension if needed.
- The agenda shall focus on:
    - High-priority work orders
    - Process improvement opportunities

21. Information Exchange Procedures: Communication and FIRST Teams

1) The Communication Team receives notification receives notifications of potential was request through:
- DGS Twitter page
- "Ask the Director" tool on the DGS website
- Email from the Mayor's Office, City Council, and City's Administrator's Office

2) A designated Communications Team member with Salesforce access creates Work Requests in Salesforce based on the received information.

3) The FIRST Team reviews Work Request, follows up for additional information need, and determines if sufficient information is available to approve the Work Request and create a Work Order.

4) For inquiries from the Director's Office of Communication Team, the FIRST Team communicates directly with the Communications Team, with the Facilities Management Division (FMD) Public Information Officer (PIO) serving as the primary point of contact.

5) The FIRST Team provides research and updates to the FMD PIO for routing and coordination.

22. Responding to Elected Official Inquiries

When receiving phone calls or emails from elected officials or their staff regarding work requests, FIRST Team members shall:

1) Document key details in Salesforce for reviewing and reporting.

2) Check for duplicates work orders, create a new work order, or update an existing one as necessary

Email Communications:

- Research the issue and provide specific details to the appropriate supervisor via email.

Constituent Services Communications:

- Refer inquiries to the Communication Team Lead

Governance & Compliance

23. Major Work Events

Major seasonal work events, including Water Turn On/Off, AC Readiness, Pools Readiness, Spray Parks Readiness, and Boiler Readiness, occur annually within specific timeframes. These events represent predictable workloads based on facility conditions and equipment readiness assessments maintained by FMD. Each event is overseen by a designated FMD supervisor or COTR.

Seasonal Water (Spring/Fall): FMD Supervisor

AC Readiness (Spring/Summer): BPO Supervisor

Pool Readiness (Spring/Summer): Contract Services Supervisor

Spray Parks Readiness (Spring/Summer): Contract Services Supervisor

Boiler Readiness (Fall/Winter): BPO Supervisor

24. Verifying DGS Property Status and Boundaries

To confirm whether a property is a DGS Property, follow these steps

1) Access the DGS Property tool at: : https://dgs.dc.gov/service/dgs-property-search.
2) Search for the building or property in question

To confirm the boundary for DGS property, utilize the Geographic Information (GIS) database managed by the Office of the Chief Technology Office (OCTO) :https://octo.dc.gov/service/dc-gis-services

25. List of Contract Services

The FIRST Team categorizes service into two tiers:

1) **Contract Services (CS) Only:** These services are managed directly by Contract Services due to specialized requirements or existing contracts. Examples include access control, elevators, fire alarms, and generators.
2) **Facilities Management Team (FMT) Review Required :** These services required Facilities Management Team (FMT) review and approval before being directed to Contract Services. This includes repairs like electrical work, plumbing, roofing, and select facility repairs.

Services Managed by Contract Services (CS)

- Access Control
- Athletic equipment repairs (Scoreboards, basketball goals, bleachers, etc.)
- CCTV and Low voltage (non-DCPS only; DCPS manages their CCTV; FEMS & MPD manages their CCTV
- Elevators
- Fire alarm
- Fire alarm systems
- Fire extinguishers
- Generators
- Handicap Lifts
- High voltage electricity
- Kitchen suppression systems
- Overhead Doors (or Rollup Doors)
- PA Systems & clocks
- Pools and Spray Parks

Service Review and Escalation Process

For the following services, FMT should attempt repair before creating a related Work Order for Contract Services.

- Concrete and Masonry repairs
- Electrical
- Fence Repair (Non-Chain Link)
- Flooring repairs (carpet, tile & non-gymnasiums)
- Gymnasium floor repairs
- Light poles (under 30ft)
- Mirrors
- Painting
- Playground equipment
- Plumbing
- Roofing repairs
- Sprinklers
- Surface repair (Asphalt)
- Windows (Glass; no Blinds) Secures request, generates related Work Orders for CS repair