



Internal Audit

Community Partnerships and Volunteer Engagement Audit

Community Partnerships and Volunteer Engagement Audit

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Date: September 10, 2025

To: Board of Trustees
Stephanie S. Elizalde, Ed.D., Superintendent

From: Robert Rubel, MBA, CPA, CIA, CISA
Chief Internal Audit Officer

Subject: Community Partnerships and Volunteer Engagement Audit

Executive Summary

The Dallas Independent School District (District) Office of Internal Audit (OIA) has completed the Community Partnerships and Volunteer Engagement Audit.

The audit focused on the adequacy and effectiveness of processes and procedures surrounding community partnerships and volunteer programs managed by the Partnerships and Volunteer Engagement (P&VE) Department. Robust partner and volunteer programs are critical to the long-term success of the District as they provide cost effective support to both students and District employees. They also support the community by providing opportunities for citizens and organizations to contribute their skills to the District without financial commitment.

Overall, the department has processes in place to manage community partnerships and volunteer engagement in accordance with regulations and District policies.

Opportunities for improvement were identified in the following areas:

Observation	Priority	Recommendation
1	Medium	Volunteer and partner screening and monitoring processes could be streamlined and strengthened to achieve both efficiencies and more effective outcomes.
2	Medium	A more robust platform would improve volunteer management through enhanced processes, reporting, and metrics/analytics.
3	Medium	Management of partnership agreements could be enhanced to gain efficiencies, improve compliance with District policies, reduce legal risks, boost program success, and optimize partner relationships.

Implementation of the recommendations in this report would assist the District in having more effective and efficient processes to engage and manage partnerships and volunteers. It would also allow staff to have a greater focus on more strategic and value-added aspects of volunteer and partnership management.

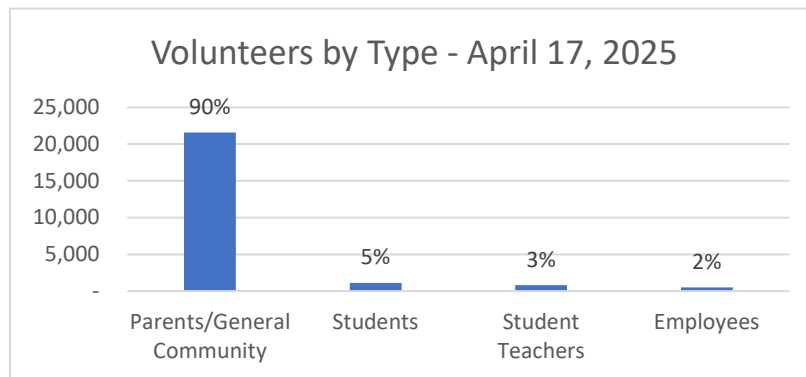
Background

Department Overview

The P&VE Department leverages the power of community collaboration to boost student success. P&VE connects local non-profit organizations, businesses, parents, and citizens with opportunities to support the District's students and staff through strategic partnerships, volunteer initiatives, and donations of in-kind resources. The department also coordinates several impactful programs on behalf of the District, including Principal for a Day (co-hosted by Dallas Regional Chamber), MLK JR Oratory Competition (hosted by Foley & Lardner), and the Superintendent's Scholarship Golf Tournament. Excluding the chief and his assistant, the department consists of five full-time equivalent employees.

Volunteer Management

Overview. Volunteers provide valuable support to campuses, including chaperoning field trips, maintaining the community gardens, shelving library books, and setting up field day activities. As of April 17, 2025, the District had 23,986 approved volunteers registered with VolunteerNow (VOLY), a third-party provider the District uses to register, screen, and manage volunteers. Registered volunteers by type in VOLY are as follows:



Three of P&VE's coordinators oversee volunteer management by supporting 80 campuses each along with the District's various departments. As P&VE has few employees, the campuses have significant responsibility for both recruiting and managing volunteers. During annual Business Academy training, P&VE encourages campuses to instill a volunteer culture at their schools by focusing on parent engagement. P&VE also urges campuses to build lasting relationships with organizations in the community to attract a sustainable flow of volunteers.

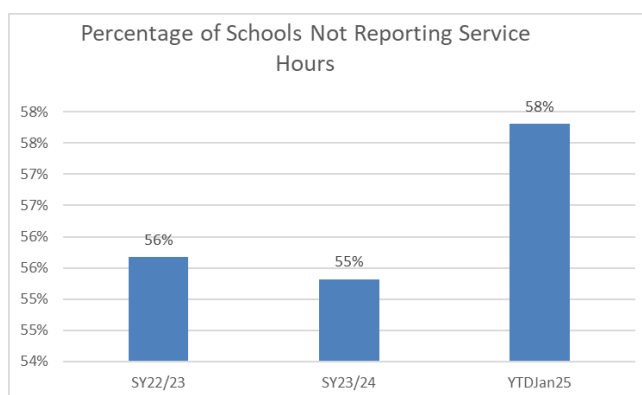
Volunteer Screening. Prior to service, volunteers must register and complete required steps to be screened and approved in VOLY. The following volunteer types are available during registration and the background check process varies depending on which type is selected.

- General Community and Parents/Guardians
- Students (must be ages 13-17 at the date of application)
- Student Teachers
- District Employees

If the applicant selects either Parents/General Community or Student Teachers, a background check is conducted via VOLY and repeated every year if the volunteer chooses to continue serving the District. If the applicant selects District Employee, they are not screened via VOLY, but rather are background checked prior to hire and continuously monitored via the FACT Clearinghouse. Students under the age of 17 are not background checked.

Volunteers must register and be screened in VOLY on an annual basis. Each time a volunteer visits a campus, the front office must verify the volunteer is registered and approved in VOLY. Additionally, when volunteers visit a campus, they are required to sign in, sign out, and must provide a valid photo ID, which is run through Raptor, the platform used to check the current national sex offender registry and print a visitor badge. Raptor is a requirement for all visitors on campus except District employees and vendors, who are monitored continuously via the FACT Clearinghouse.

Requesting and Logging Services: Campuses are encouraged to publish volunteer opportunities in VOLY for both recruiting and reporting purposes. Campus staff are also responsible for ensuring service hours for volunteers are logged into VOLY, which can be accomplished by checking volunteers in VOLY's portal upon arrival and then out upon departure. P&VE monitors volunteer engagement via VOLY reporting, which shows service hours by campus and by volunteer. According to VOLY, 127,471 service hours were logged during the 2023-2024 school year. However, this figure is likely significantly understated as only 45% of schools reported any service hours in VOLY during the SY23/24 period as illustrated in the following graph:



Partnerships

Overview. Distinct from vendors and donors, partners are defined as those entities which provide free, ongoing services to the District. As of May 1, 2025, P&VE had 58 partnerships logged. The vast majority of partners managed by P&VE are non-profit organizations such as United to Learn, which provides services focused on student literacy, social/emotional health, educational equity, and campus support. The goal of these partnerships is to mitigate gaps and expand available resources by leveraging businesses and community organizations to support both the needs and wants of students, schools, and departments. P&VE does not manage all District partnerships. For example, there are industry and educational partners managed by the P-TECH and Early College Programs Department, Pre-K partnerships managed by the Early Learning Department, and intern and student teaching agreements managed by HCM.

Campuses and departments are responsible for determining their specific needs and recruiting partners. P&VE provides training and oversight to ensure agreements are aligned with the

District's goals, mission, and initiatives and adhere to any laws, regulations, or policies. Although reliance is primarily on the campuses to determine needs and recruit partners, as P&VE builds relationships with potential partners, they have greater ability to identify ways the partner can become involved. If a potential partner does not have a specific school in mind to serve, P&VE steers them to choose underserved campuses. They consistently spread the message to partners that some schools/departments have a greater need than others and it is important to spread resources district-wide. If a partner is inflexible with regards to the school to serve, P&VE works to create more opportunities for all schools in the longer-term with that partner. The ultimate goal is to turn the partners into champions of the District by maximizing the benefit to both the students and the organization.

Partnership Agreements. Currently, many potential partners approach a school/department directly, but P&VE's goal is to have one central entry point to ensure the entire process is followed as designed. Campuses are trained at the annual Business Academy to contact P&VE with regards to any potential partnerships. District procedures require partnership agreements to be documented on the District's standard agreement template and reviewed and approved by P&VE as well as General Counsel.

Partner Screening. Similar to volunteers, employees associated with District partners that are on a campus or interact with students virtually must be registered/screened in VOLY and processed through Raptor when on campus. Like volunteers, partners must re-apply in VOLY every year, at which time the background check is repeated. The standard partnership agreement delineates the responsibilities of both partners and schools/departments regarding partner vetting. Partners must also notify the District if an assigned employee is arrested or convicted of a felony or misdemeanor involving moral turpitude subsequent to VOLY screening.

Assessing Partnership Services. To capture a partner's contribution, campuses are required to record the service hours in VOLY. Because partners do not have their own "applicant type" in VOLY, their service hours cannot be easily distinguished from other volunteers. As such, partner contributions are included in the charts previously depicted in the volunteer background section above. Campuses/departments are also instructed to review the performance of partnership services.

Donations

Campuses are regularly in need of seasonal clothing, uniforms, books, supplies, and incentive items. P&VE pursues donations of such resources year-round. To communicate needs for these items, schools have historically conducted a needs survey on an annual basis. Because this method was inefficient and ineffective, Enterprise Applications personnel within the Educational Technology Department are building a new solution using Oracle Application Express (APEX). The new solution will enable campuses to submit needs in a more specific, timely, and user-friendly manner.

The solution being developed by Enterprise Applications will also replace the database currently being used by the schools/departments to log monetary and in-kind donations received. This information is currently needed to populate the quarterly report of donations valued at \$5,000 or more provided to Trustees for ratification. The new solution will digitize the Report of a Gift Form, automate donation approvals, and enhance reporting. The next phase of this project will improve the efficiency and propriety of donation processing at the campus level. OIA is supporting the development of this solution through an advisory project.

Additionally, OIA is currently supporting P&VE with Enterprise Application's development of a solution to automate the Principal for a Day registration process.

Scope

The audit period focused on current processes and procedures along with related data for fiscal year 2024-2025. Certain other matters, procedures, and transactions outside that period were reviewed to understand and verify information during the audit period.

Objective

The objective of the audit was to evaluate the adequacy and effectiveness of processes and procedures over the management of community partnerships and volunteer programs within the District.

Methodology

Auditors interviewed key personnel, conducted walkthroughs, and reviewed supporting documents to understand processes and procedures surrounding Community Partnerships and Volunteer Engagement.

Detailed audit procedures are noted below:

1. Volunteer Management - To determine if the District has effective processes and procedures to engage, screen, assess, and monitor volunteers, auditors performed the following:
 - Conducted site visits for a sample selection of campuses to observe volunteer security procedures, including physical controls over entry points, identification checks, validation of screening, and security badges.
See Recommendation 1 in this report.
 - For the campuses visited, selected a sample of volunteer sign in sheets and verified the following:
 - The volunteers on the sign in sheet were fully screened, including a completed application, cleared background check, and executed orientation.
 - Service hours were reported for each volunteer for the day selected.
See Recommendation 1 in this report.
 - Obtained a listing of volunteers by type from VOLY and verified volunteers reported as employees or student volunteers were noted as active employees in Oracle or active students in PowerSchool.
See Recommendation 1 in this report.
 - Analyzed available metrics from VOLY, including service hours and registered volunteers, to assess and compare trends for high and low participation.
See Recommendation 2 in this report.
 - For the campuses visited, assessed the volunteer experience by asking current volunteers and staff for their feedback and suggestions to optimize volunteerism.

See Recommendation 2 in this report.

2. Partnerships - To determine if the District has effective processes and procedures over partnership management, auditors performed the following:

- Conducted site visits for a sample selection of campuses and walked through the partnership development process, including:
 - Cultivation of potential partners
 - Alignment with District mission, goals, and initiatives
 - Involvement of the Partnerships & Volunteer Engagement Department
 - Approvals and authorizations for partnership agreements
 - Performance monitoring

See Recommendation 3 in this report.

- For the campuses visited, auditors inquired about any partnerships that are currently in place and verified the following:
 - The standard agreement template was utilized
 - The agreement included a scope of work/curriculum as an attachment if required
 - All signature approvals were obtained as necessary
 - Partner employees applied in VOLY, were background checked, and completed orientation
 - The partnership agreement is on file with Partnerships & Volunteer Engagement
- See Recommendations 1 and 3 in this report.

- Reviewed the District's standard partnerships agreement template to assess the adequacy, clarity, and compliance of the template with applicable policies, legal requirements, and best practices.

No observations were noted.

Primary criteria used for this audit were:

- 1) Texas Education Code (TEC) Section 22.0835 Access to Criminal History Records of Student Teachers and Volunteers by Local and Regional Education Authorities, updated June 2023
- 2) GKG (Regulation) – Community Relations – School Volunteer Programs, September 2015
- 3) Campus Partner and Volunteer Coordinator VOLY Training – 2024-2025 School Year
- 4) The Council for Corporate & School Partnerships, 2002
 - A How-to Guide for School-Business Partnerships
 - Guiding Principles for Business and School Partnerships
- 5) Standards for Internal Control in the Federal Government, United States Government Accountability Office, Principles 11, 13 through 15, September 2014.
- 6) National Partnership for Student Success (NPSS)
<https://www.partnershipstudentsuccess.org/>, as of June 2025

Audit Observations and Recommendations

Observation 1 – Systems and processes used to screen and monitor volunteers and partners could be streamlined.

Condition

During testing of volunteer and partner screening, auditors noted campuses did not consistently screen volunteers and/or partners in accordance with procedures. Out of the five campuses visited, only two of them screened in both platforms (VOLY and Raptor) as procedures require.

Additionally, as District employees and students are not required to be screened in VOLY or Raptor, auditors attempted to verify registrant types classified as employees and students were valid by comparing to employee listings from HCM and student listings from PowerSchool. This comparison resulted in several potential exceptions as student and employee IDs are not provided during registration, and therefore auditors were only able to compare based on names. Additionally, registrants identified as students may be students from other districts, which would not be included on the PowerSchool listing. As results may be skewed, auditors were unable to fully verify registrants identified as employees or students were valid. It should be noted that there is a process in place for campuses to verify student and District employee volunteers via review of their badges. There is no documentation of this review, however, for auditors to confirm employee and student volunteers have been screened appropriately.

Cause

Although P&VE's procedures and training materials outline District compliance requirements, concurrent use of multiple systems to screen volunteers and partners, as well as all other visitors, has caused confusion amongst campus personnel.

Effect

Raptor is used to check campus visitors against the national sex offender database, whereas VOLY is used for the criminal background check of volunteers and partners prior to service. Volunteers and partners who are only screened in one platform won't be thoroughly background checked, increasing safety and security risks.

Recommendation 1

To streamline and improve the District's screening process for campus volunteers and partners and to encourage compliance, P&VE should collaborate with the School Safety, Resources, & Monitoring Department to explore options for using a single platform to screen visitors and manage volunteers and partners. The ideal solution would include the following features:

- One platform to conduct all required security screenings
- Digital visitor logs to replace paper-based records to more easily document and monitor all visitors were properly screened and their time on campus was logged
- Integration with Oracle and PowerSchool to automatically validate volunteer applications for District students and employees

- Ability to upload student identification cards for students from other school districts who volunteer on site

Risk Level for Observation 1: Medium¹

Management Response

Acknowledgement of observation:

- ☒ Agree
☐ Disagree

Management Response:

The Partnerships and Volunteer Engagement (P&VE) department acknowledges the observation that the current systems and processes for screening and monitoring volunteers and partners may not be consistently followed across campuses and could benefit from streamlining. The noted inconsistencies in the use of both VOLY and Raptor platforms, as well as the challenges in verifying students and employees due to lack of ID integration, highlight the need for a more cohesive and efficient screening process.

P&VE agrees with the recommendation and is committed to enhancing the volunteer and partner screening process to ensure consistency, improve campus compliance, and strengthen overall campus safety. P&VE will initiate collaboration with the School Safety, Resources, & Monitoring Department, as well as Information Technology, Human Capital Management, and Student Data Services, to explore solutions that streamline the screening process.

This includes evaluating platforms capable of integrating visitor management and volunteer engagement into a single system that allows for real-time sex offender checks and criminal background screening, automated validation of district employees and students via integration with Oracle and PowerSchool, digital logging of campus visits to replace paper sign-ins, and upload capabilities for verifying student IDs from other districts.

P&VE will also review and enhance existing training and communication materials for campus staff to clarify expectations and support campus compliance during the transition.

Estimated Implementation Date: December 2026

Individuals responsible for implementation:

Marlon Brooks, Executive Director of School Safety, Resources, & Monitoring
 Candace Sledge, Director of Partnerships & Volunteer Engagement

¹ See Attachment 1 for Definition of Risk Level.

Observation 2 – Reporting metrics and functionality of the volunteer management platform could be enhanced.

Condition

During review of volunteer and partnership management, auditors were unable to analyze or assess the effectiveness, reach, or equity of the District's volunteers and partnerships as the current platform lacks relevant functionality, data, and reporting capabilities. For example, the VOLY platform does not support the generation of key performance metrics such as volunteer/school-level engagement, demographic distribution, program participation, volunteer satisfaction, or partner contributions.

Additionally, during campus visits, auditors noted several campuses utilized other platforms such as Sign-up Genius to request and schedule volunteer services as it was noted that VOLY was not user friendly. Auditors received similar feedback from volunteers while on site: that the platform's registration process was slow, redundant, and not user friendly.

Cause

The platform was initially selected for its basic scheduling and background check features, and more in-depth functionality and reporting capabilities may not have been prioritized during procurement or implementation. Additionally, as volunteer and partnership programs have advanced, the need for additional functionality and reporting has grown.

Furthermore, according to their website, VOLY's on-line platform was launched in 2013. VOLY no longer employs staff to manage the technical aspects of the platform. Instead, VOLY utilizes third party technology partners on a pro bono basis. It was noted during the audit that these technology partners perform little regular maintenance or development work.

Effect

Without access to comprehensive metrics and reporting tools, the District lacks visibility into the scale, distribution, and impact of volunteer efforts. This limits the ability to effectively and efficiently:

- Monitor volunteer and partner engagement across schools
- Evaluate program effectiveness and alignment with student needs
- Ensure equitable distribution of resources and support
- Meet internal and external reporting requirements, including those tied to grants or board oversight

This lack of visibility may result in missed opportunities for improvement, inefficient use of community resources, and potential inequities in service delivery. Additionally, there are data privacy and security risks associated with using a third-party platform that does not have regular development or maintenance.

Recommendation 2

The District should initiate a review of its volunteer and partnership data needs and evaluate whether the current platform can be enhanced to meet those needs. If not feasible, the District should consider procuring or integrating a system with robust reporting and analytic capabilities.

When reviewing platforms and capabilities, below are factors to consider based on needs and issues noted during the audit:

- Automation of as many steps as possible to apply, screen, create opportunities, check in/out, and record service hours with built-in quick access training to enable end users to troubleshoot issues
- Ability to distinguish partners from volunteers
- Robust management reporting and dashboards that illustrate trends for service hours, the volume of opportunities, volunteer headcount, retention, and demographics. Reporting and dashboards should be available both overall and by campus and volunteer/partner type
- Automated surveys for volunteers/partners to provide feedback using a consistent cadence
- Best in class data privacy and security protections

Additionally, a formal process should be established to periodically assess data requirements and ensure alignment with evolving program goals and compliance obligations.

If a consolidated solution is not achievable in the short-term, P&VE should consider the following suggestions to more effectively manage its volunteer and partner program:

- Add Partner Employee as a volunteer type in VOLY with a separate application that includes the company name to track compliance and service hours separately
- Revise the student and District employee applications to require their student and employee identification numbers and implement a process to periodically compare IDs to student and employee listings.
- If VOLY is unable to process uploads, require non-District students to include their school's name, student identification number, and reason for volunteering on the application
- Regularly follow up with VOLY to suggest enhancements
- Reorganize the training files on P&VE's website to be more user-friendly and develop quick reference cards for the campuses summarizing the compliance requirements to further encourage compliance
- Implement an annual survey of volunteers and partners to gain feedback and improve experiences

Risk Level for Observation 2: Medium²

Management Response

Acknowledgement of observation:

- ☒ Agree
☐ Disagree

² See Attachment 1 for Definition of Risk Level.

Management Response:

The Partnerships and Volunteer Engagement (P&VE) department acknowledges the observation that the current volunteer management platform lacks comprehensive reporting functionality, which limits the District's ability to evaluate the scale, equity, and impact of its volunteer and partner engagement efforts. Additionally, feedback from campuses and volunteers confirms that the platform presents usability challenges, leading some to seek alternative scheduling tools.

P&VE agrees with the recommendation and recognizes the importance of improving access to data, reporting tools, and user-friendly features to effectively manage and assess volunteer and partner engagement. A comprehensive review of volunteer and partnership data needs will be

conducted to evaluate whether the current platform can meet the evolving demands of the program or if a new solution is warranted.

This review will include collaboration with IT, Evaluation & Accountability, School Leadership, and external stakeholders to identify required performance metrics aligned with board priorities, grant compliance, and equity goals; explore systems with enhanced analytics dashboards, automated tracking, and robust privacy protections; ensure usability for campuses, volunteers, and partners with intuitive interfaces and automated features; assess integration potential with other District systems (e.g., Oracle, PowerSchool); and establish a formal process for regularly assessing data and reporting needs to support continuous improvement.

In the interim, P&VE will implement enhancements to the existing system and processes, including:

- Adding new volunteer types to better distinguish partners, students, and employees;
- Revising applications to capture student and employee IDs;
- Improving the organization and accessibility of training resources;
- Launching annual volunteer and partner surveys for feedback;
- Working with VOLY to identify feasible platform improvements.

Estimated Implementation Date: December 2026

Individuals responsible for implementation:

Candace Sledge, Director of Partnerships & Volunteer Engagement

Tonya Mayberry-Davis, Coordinator of Volunteer Engagement

Tambria Barnes, Director of Educational Technology Administration

Observation 3 – Management of partnership agreements could be streamlined and optimized.

Condition

During review and testing of processes surrounding management of partnerships, auditors noted strategic gaps in partnership management including:

- While the District has established a centralized department to manage community partnerships, the current structure allows and relies on individual departments and campuses to independently identify needs and engage with partners. There is also no formal process in place for campuses to share partner information or leverage existing relationships.
- The central department does not yet proactively assess campus needs to support partner matching, and there is no mechanism to ensure or measure equitable distribution of partnership resources or to evaluate their impact.
- Known partnership agreements are tracked manually via spreadsheet and stored on Google Drives accessible primarily to P&VE or other managing departments, with no centralized, District-wide repository or visibility.

Cause

The current decentralized approach to identifying and managing partnerships appears to be a legacy practice that has not yet been fully integrated into a centralized model. As noted previously, many partners bypass P&VE and go directly to schools or departments to establish an arrangement. There is a lack of formal processes, tools, and communication protocols to support cross-campus/department collaboration, needs assessment, and data sharing. Although P&VE regularly trains campus and department personnel, confusion still exists regarding the partnership process and related compliance requirements. This confusion is further fed by turnover amongst staff at the campuses.

Effect

The reliance on manual and segmented procedures throughout the partnership lifecycle has resulted in functional gaps that hinder P&VE's ability to effectively manage the partnership process for the District as a whole and increases the risk of the following:

- Non-compliant partnership agreements that do not align with the District's mission, goals, or initiatives.
- Redundant or overlapping partnerships across campuses.
- Missed opportunities to scale high-impact partnerships district-wide.
- Inequitable access to partner resources, particularly for high-need campuses.
- Inability to assess the effectiveness or return on investment of partnerships.
- Data loss due to informal document storage practices.

Recommendation 3

The District should develop and implement a more robust District-wide partnership strategy. P&VE should collaborate with other departments that manage partnerships along with Educational Technology and Legal and explore options to implement a centralized solution with both contract and customer relationship management (CRM) capabilities that includes:

- A more strategic manner to optimize external relationships by utilizing reporting to view partnership activities holistically such as implementing a partner matching algorithm with tagging and filtering capabilities and establishing a cross-departmental review committee.
- A formal process for assessing campus needs and matching them with vetted partners. Some examples include developing a digital needs assessment tool such as an online survey (potential to use the in-kind donation needs assessment portal currently being developed). Processes should be implemented to assess needs on a continuous basis.
- A more automated contract development and management process that includes workflows and tracks contract status, renewal dates, etc., and a centralized accessible repository for all partnership agreements and documentation. Ideally, the platform would integrate with the District's existing systems and support version control, e-signatures, and access permissions. As the District does not currently have a robust contract management tool for any of its contracts, consideration should be given to include all District contracts, not just exclusive to partnerships.
- A framework for evaluating partnership outcomes and ensuring equitable distribution of services. Potential processes would include developing key performance indicators (KPIs) and implementing data collection protocols (such as use of reports or dashboards) to periodically assess KPIs. P&VE should consider collaborating with the District's Program Evaluation Department to aid in establishing a framework for significant partnerships.
- Communication protocols to encourage collaboration and sharing of partner resources across departments and campuses such as newsletters, internal collaboration hubs, partner showcases, etc. P&VE should collaborate with the Communications Department to develop a framework for strategically marketing and promoting partnerships.

Additionally, to improve compliance and encourage a centralized partnership management process, P&VE should consider the following:

- Update District policy and procedures requiring partnership proposals and agreements to be routed through P&VE prior to engagement.
- Further standardize and streamline the intake process by developing an electronic standardized intake form and approval workflow for partnership requests. Communicate the form by posting on the P&VE website as well as campus websites. Consider using QR codes with links to the form on campus marquees, PTA newsletters, etc.
- Launch a District-wide communication campaign to clarify the role of the central partnerships office and the benefits.
- Establish a monitoring process to identify unauthorized partnership agreements such as periodic audits or surveys requesting campuses to report any external partnerships.

Risk Level for Observation 3: Medium³

³ See Attachment 1 for Definition of Risk Level.

Management Response

Acknowledgement of observation:

- ☒ Agree
☐ Disagree

Management Response:

The Partnerships and Volunteer Engagement (P&VE) department acknowledges the observation that the current partnership management process across the District is fragmented, with a lack of centralized tracking, strategy, and tools. The legacy approach of decentralized engagement, coupled with limited visibility and coordination, creates inefficiencies and limits the ability to measure the impact, scale effective partnerships, and ensure equitable resource distribution.

P&VE agrees with the recommendation and recognizes the need to implement a comprehensive, district-wide strategy for partnership management. As part of its commitment to streamlining operations, improving compliance, and maximizing the impact of community partnerships, P&VE will collaborate with Educational Technology, Legal Services, Evaluation and Assessment, and other departments currently managing external partnerships to explore and implement a centralized platform with contract and customer relationship management (CRM) functionality.

This effort will include:

- Development of a unified digital platform to serve as a repository for all partnership agreements, including capabilities for contract lifecycle tracking, version control, and integration with existing systems (Oracle, Google, etc.).
- Creation of an automated intake and approval process, including electronic forms, workflows, and clearly defined routing procedures.
- Launch of a formal needs assessment tool (building on the in-kind donation portal currently in development) to proactively match high-need campuses with vetted partners.
- Design of a district-wide framework to evaluate partnership outcomes through KPIs, dashboards, and periodic reporting, in partnership with the District's Program Evaluation team.
- Implementation of communication protocols and collaboration mechanisms, including internal newsletters, campus-facing training materials, a central hub for partnership stories/resources, and campus showcases to promote best practices and foster engagement.
- District policy revisions and expanded training to ensure that all partnership agreements are reviewed through the appropriate channels and to reinforce P&VE's role in supporting strategic and compliant community engagement.

This initiative aligns with the District's goals of operational efficiency, equity, and accountability and will increase transparency, minimize duplication, and strengthen long-term external relationships.

Estimated Implementation Date: December 2026

Individuals responsible for implementation:

Candace Sledge, Director of Partnerships & Volunteer Engagement
Veena Armstrong, Coordinator Partnership & Volunteer Engagement
Tiffany Huitt, Chief Schools Officer, School Leadership

Conclusion

On a daily basis, both students and District employees are supported by partners and volunteers. In an age of resource constraints, it is critical that the District take a strategic approach to optimize and leverage its partnership and volunteer programs to boost cost effective solutions for students and District employees. To ultimately succeed, this strategic approach must be supported by robust processes and systems to improve efficiency, functionality, and the user experience.

Overall, processes are in place to manage partnerships and volunteers. Implementation of the recommendations in this report would boost the success of the department's programs while improving the efficiency and effectiveness of its processes.

We would like to thank P&VE and Education Technology for their cooperation and assistance with this audit.

The audit was conducted in conformance with the Institute of Internal Auditors' *Global Internal Audit Standards*. Those standards require OIA to plan and perform the audit to obtain sufficient, reliable, and relevant evidence to provide a reasonable basis for our observations and conclusions based on our audit objectives. OIA believes the evidence obtained provides a reasonable basis for our observations and conclusions based on our audit objectives.

Respectfully submitted,

Robert Rubel

Robert Rubel, MBA, CPA, CIA, CISA
Chief Internal Audit Officer

Cc: Pamela Lear, Ed.D., Deputy Superintendent of Staff & Accountability
Brian Lusk, Deputy Superintendent of Schools and Academics
Cheryl Nevels, Deputy Chief, College Readiness, Postsecondary Partnerships and Programs, Schools and Academics
Sibu McNeal, Director II, Early College, Postsecondary Partnerships and Programs, Schools and Academics
Jon Dahlander, Chief of Partnerships & Intergovernmental Relations Office, Partnerships and Volunteer Engagement
Candace Sledge, Director I, Partnerships and Volunteer Engagement
Tonya Mayberry Davis, Coordinator I, Partnerships and Volunteer Engagement
Veena Armstrong, Coordinator I, Partnerships and Volunteer Engagement
Tiffany Huitt, Chief Schools Officer, School Leadership

Marlon Harrison, Chief Technology Officer, Educational Technology Administration
Sean Brinkman, Assistant Superintendent, Enterprise Support Services, Educational
Technology Administration
Tambria Barnes, Director, Technology II, Enterprise Applications, Enterprise Support
Services, Educational Technology Administration
Albert Martinez, Chief Police Officer, Dallas ISD Police Department
Marlon Brooks, Executive Director, School Safety, Resources, & Monitoring, Dallas ISD
Police Department
Ramona Soto, General Counsel, Legal Services

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Eva Narten, CPA, CIA, CISA, Deputy Chief, Internal Audit
Shelly Kelley, CPA, Audit Director II
Karyn Pfeffer, CPA, Auditor II

Attachment 1

Definition of Risk Level

Risk Level	Definition
High	These risks could directly impact the achievement of critical strategic or operational objectives of the District. There is a high likelihood of occurrence, and if the event materializes, it could result in a significant negative impact on the District's financial stability, operational efficiency, ability to meet intended outcomes, reputation, or compliance, potentially exceeding the District's risk appetite.
Medium	These risks pose a moderate likelihood of occurrence and could have a notable adverse impact on important operational aspects of the District. While undesirable, the potential financial, reputational, strategic or compliance consequences are less severe than high-level risks and may approach the District's risk appetite.
Low	These risks have a low likelihood of occurrence and are expected to have a minimal impact on the District's operational efficiency, financial standing, reputation, or compliance. These risks are generally within the District's risk appetite but still warrant monitoring and may require basic controls.

Management Response

Observation 1 – Systems and processes used to screen and monitor volunteers and partners could be streamlined.

Acknowledgement of observation:

- ☒ Agree
☐ Disagree

Management Response:

The Partnerships and Volunteer Engagement (P&VE) department acknowledges the observation that the current systems and processes for screening and monitoring volunteers and partners may not be consistently followed across campuses and could benefit from streamlining. The noted inconsistencies in the use of both VOLY and Raptor platforms, as well as the challenges in verifying students and employees due to lack of ID integration, highlight the need for a more cohesive and efficient screening process.

P&VE agrees with the recommendation and is committed to enhancing the volunteer and partner screening process to ensure consistency, improve campus compliance, and strengthen overall campus safety. P&VE will initiate collaboration with the School Safety, Resources, & Monitoring Department, as well as Information Technology, Human Capital Management, and Student Data Services, to explore solutions that streamline the screening process.

This includes evaluating platforms capable of integrating visitor management and volunteer engagement into a single system that allows for real-time sex offender checks and criminal background screening, automated validation of district employees and students via integration with Oracle and PowerSchool, digital logging of campus visits to replace paper sign-ins, and upload capabilities for verifying student IDs from other districts.

P&VE will also review and enhance existing training and communication materials for campus staff to clarify expectations and support campus compliance during the transition.

Estimated Implementation Date: December 2026

Individuals responsible for implementation:

Marlon Brooks, Executive Director of School Safety, Resources, & Monitoring
Candace Sledge, Director of Partnerships & Volunteer Engagement

Observation 2 – Reporting metrics and functionality of the volunteer management platform could be enhanced.

Acknowledgement of observation:

- ☒ Agree
☐ Disagree

Management Response:

The Partnerships and Volunteer Engagement (P&VE) department acknowledges the observation that the current volunteer management platform lacks comprehensive reporting functionality, which limits the District's ability to evaluate the scale, equity, and impact of its volunteer and partner engagement efforts. Additionally, feedback from campuses and volunteers confirms that the platform presents usability challenges, leading some to seek alternative scheduling tools.

P&VE agrees with the recommendation and recognizes the importance of improving access to data, reporting tools, and user-friendly features to effectively manage and assess volunteer and partner engagement. A comprehensive review of volunteer and partnership data needs will be

conducted to evaluate whether the current platform can meet the evolving demands of the program or if a new solution is warranted.

This review will include collaboration with IT, Evaluation & Accountability, School Leadership, and external stakeholders to identify required performance metrics aligned with board priorities, grant compliance, and equity goals; explore systems with enhanced analytics dashboards, automated tracking, and robust privacy protections; ensure usability for campuses, volunteers, and partners with intuitive interfaces and automated features; assess integration potential with other District systems (e.g., Oracle, PowerSchool); and establish a formal process for regularly assessing data and reporting needs to support continuous improvement.

In the interim, P&VE will implement enhancements to the existing system and processes, including:

- Adding new volunteer types to better distinguish partners, students, and employees;
- Revising applications to capture student and employee IDs;
- Improving the organization and accessibility of training resources;
- Launching annual volunteer and partner surveys for feedback;
- Working with VOLY to identify feasible platform improvements.

Estimated Implementation Date: December 2026

Individuals responsible for implementation:

Candace Sledge, Director of Partnerships & Volunteer Engagement
Tonya Mayberry-Davis, Volunteer Engagement Coordinator
Tambria Barnes, Director of Educational Technology Administration

Observation 3 – Management of partnership agreements could be streamlined and optimized.

Acknowledgement of observation:

- ☒ Agree
☐ Disagree

Management Response:

The Partnerships and Volunteer Engagement (P&VE) department acknowledges the observation that the current partnership management process across the District is fragmented, with a lack of centralized tracking, strategy, and tools. The legacy approach of decentralized engagement, coupled with limited visibility and coordination, creates inefficiencies and limits the ability to measure the impact, scale effective partnerships, and ensure equitable resource distribution.

P&VE agrees with the recommendation and recognizes the need to implement a comprehensive, district-wide strategy for partnership management. As part of its commitment to streamlining operations, improving compliance, and maximizing the impact of community partnerships, P&VE will collaborate with Educational Technology, Legal Services, Evaluation and Assessment, and other departments currently managing external partnerships to explore and implement a centralized platform with contract and customer relationship management (CRM) functionality.

This effort will include:

- Development of a unified digital platform to serve as a repository for all partnership agreements, including capabilities for contract lifecycle tracking, version control, and integration with existing systems (Oracle, Google, etc.).
- Creation of an automated intake and approval process, including electronic forms, workflows, and clearly defined routing procedures.
- Launch of a formal needs assessment tool (building on the in-kind donation portal currently in development) to proactively match high-need campuses with vetted partners.
- Design of a district-wide framework to evaluate partnership outcomes through KPIs, dashboards, and periodic reporting, in partnership with the District's Program Evaluation team.
- Implementation of communication protocols and collaboration mechanisms, including internal newsletters, campus-facing training materials, a central hub for partnership stories/resources, and campus showcases to promote best practices and foster engagement.
- District policy revisions and expanded training to ensure that all partnership agreements are reviewed through the appropriate channels and to reinforce P&VE's role in supporting strategic and compliant community engagement.

This initiative aligns with the District's goals of operational efficiency, equity, and accountability and will increase transparency, minimize duplication, and strengthen long-term external relationships.

Estimated Implementation Date: December 2026

Individuals responsible for implementation:

Candace Sledge, Director of Partnerships & Volunteer Engagement

Veena Armstrong, Coordinator of Partnership & Volunteer Engagement

Tiffany Huitt, Chief Schools Officer, School Leadership

Criteria by Observation

Observation 1 – Criteria

Texas Education Code (TEC) Section 22.0835 Access to Criminal History Records of Student Teachers and Volunteers by Local and Regional Education Authorities, updated June 2023

(a) A school district, open-enrollment charter school, or shared services arrangement shall obtain from the department and may obtain from any other law enforcement or criminal justice agency or a private entity that is a consumer reporting agency governed by the Fair Credit Reporting Act (15 U.S.C. Section 1681 et seq.), all criminal history record information that relates to:

(1) a person participating in an internship consisting of student teaching to receive a teaching certificate; or

(2) a volunteer or person who has indicated, in writing, an intention to serve as a volunteer with the district, school, or shared services arrangement.

(c) A person to whom Subsection (a) or (b) applies must provide to the school district, open enrollment charter school, private school, regional education service center, or shared services arrangement a driver's license or another form of identification containing the person's photograph issued by an entity of the United States government.

(d) A person to whom Subsection (a) applies may not perform any student teaching or volunteer duties until all requirements under Subsections (a) and (c) have been satisfied.

(e) Subsections (a) and (c) do not apply to a person who volunteers or is applying to volunteer with a school district, open-enrollment charter school, or shared services arrangement if the person:

(1) is the parent, guardian, or grandparent of a child who is enrolled in the district or school for which the person volunteers or is applying to volunteer;

(2) will be accompanied by a school district employee while on a school campus; or

(3) is volunteering for a single event on the school campus.

(f) A school district, open-enrollment charter school, or shared services arrangement may obtain from any law enforcement or criminal justice agency all criminal history record information that relates to a person to whom Subsection (e) applies.

Dallas Independent School District GKG (Regulation) – Community Relations – School Volunteer Programs, September 2015

Volunteer Background Check Process

Anyone who wants to participate as a volunteer must register using the Dallas ISD volunteer application. This online registration is available at <http://www.dallasisd.org>.

Volunteers performing services within a school year who are one-time visitors and subject to the constant supervision of a District employee may be exempt from the criminal history record check. [See GKG(LOCAL)]

Current Dallas ISD employees and current vendors in good standing are exempt from completing the volunteer background screen. If the employment or contract relationship is terminated, an individual will have to complete the volunteer registration process described herein. Criminal history record check/background screens should be renewed once each school year for returning volunteers.

Observation 2 – Criteria

Standards for Internal Control in the Federal Government, United States Government Accountability Office, Principle 11 – Design Activities for the Information System, Section 11.03 – Design of the Entity’s Information System, September 2014.

11.03 Management designs the entity’s information system to obtain and process information to meet each operational process’s information requirements and to respond to the entity’s objectives and risks. An information system is the people, processes, data, and technology that management organizes to obtain, communicate, or dispose of information. An information system represents the life cycle of information used for the entity’s operational processes that enables the entity to obtain, store, and process quality information.

National Partnership for Student Success (NPSS). <https://www.partnershipstudentsuccess.org/>, as of June 2025

According to best practices in public sector volunteer management and internal performance monitoring, systems should support data-driven decision-making by enabling the collection, analysis, and reporting of key metrics. The U.S. Department of Education and National Partnership for Student Success recommend that districts maintain robust data systems to evaluate the effectiveness and equity of volunteer and partnership programs.

Observation 3 – Criteria

The Council for Corporate & School Partnerships: Guiding Principles for Business and School Partnerships, 2002

School-business partnerships must be built on shared values and philosophies. Partnerships should:

- Begin with an open and frank discussion about values, goals, and needs.
- Respect and reflect the culture and goals of both the education and business partners.
- Support the core mission of the school.
- Bolster the academic, social, and physical well-being of students.
- Compliment the social values and goals of the school, business partner and the community.

Partnerships should be defined by mutually beneficial goals and objectives. Partnerships should:

- Clearly define short and long-range goals.
- Focus on collaboration to determine activities that meet the goals of all involved.

- Be aligned with education goals and board policies of individual schools and/or districts.

Partnership activities should be integrated into the school and business cultures.

- Partners should communicate frequently to respect and understand each other's cultures.
- Partnerships should provide students, teachers and business employees with opportunities to interact at school, community and business sites.

Partnerships should be driven by a clear management process and structure.

- Each school and district should have a point person to manage partnerships to ensure quality and alignment with educational goals for students.
- Partnerships should include written descriptions of roles and responsibilities, accountability measures and guidelines for responsibilities of educators and business employees.
- Partnerships should include training for all key personnel.

Partnerships should define specific, measurable outcomes.

- Partnerships should be guided by a written collaborative agreement on outcomes, benchmarks and measures of progress.

Partnerships should have support at the highest level within the business and school and concurrence at all levels.

- Superintendents, principals, school boards, CEOs and managers should articulate and demonstrate support for the partnership internally and externally.
- Partnerships should be explicitly supported by teachers, employees and other constituents.
- Communities should have the opportunity to review and contribute to partnerships.

Partnerships should include detailed internal and external communications plans, which clearly illustrate expectations of all parties.

- Partners should communicate regularly about intended and actual outcomes of all activities.
- Communication about partnerships should allow opportunities for private and public recognition of both parties.

Partnerships should be developed with clear definitions of success for all partners.

- Measures for success should be established at the outset of the partnership.
- Partnerships should be evaluated on a regular, agreed-upon basis.
- Evaluation should include collection and analysis of information to determine accomplishments, strengths and weaknesses of the partnership.

The Council for Corporate & School Partnerships: A How-to Guide for School-Business Partnerships, 2002

1. Based on definitions of success determined earlier, conduct regular evaluations that include data collection and analysis to determine accomplishments, strengths and weaknesses of the partnership.