

# Creating an NQMS Goal

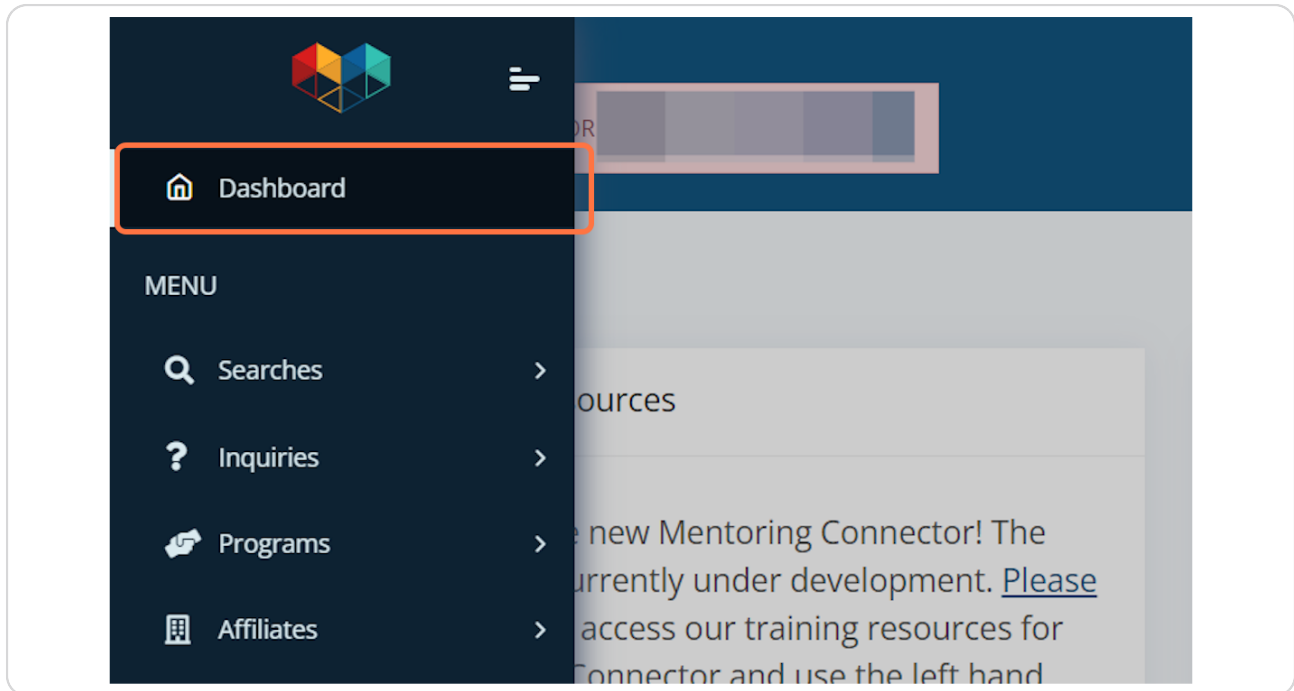
13 Steps [View most recent version on Tango.ai](#) 

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Created by	Creation Date	Last Updated
Nicki Patnaude	Jul 31, 2024	Jan 14, 2025

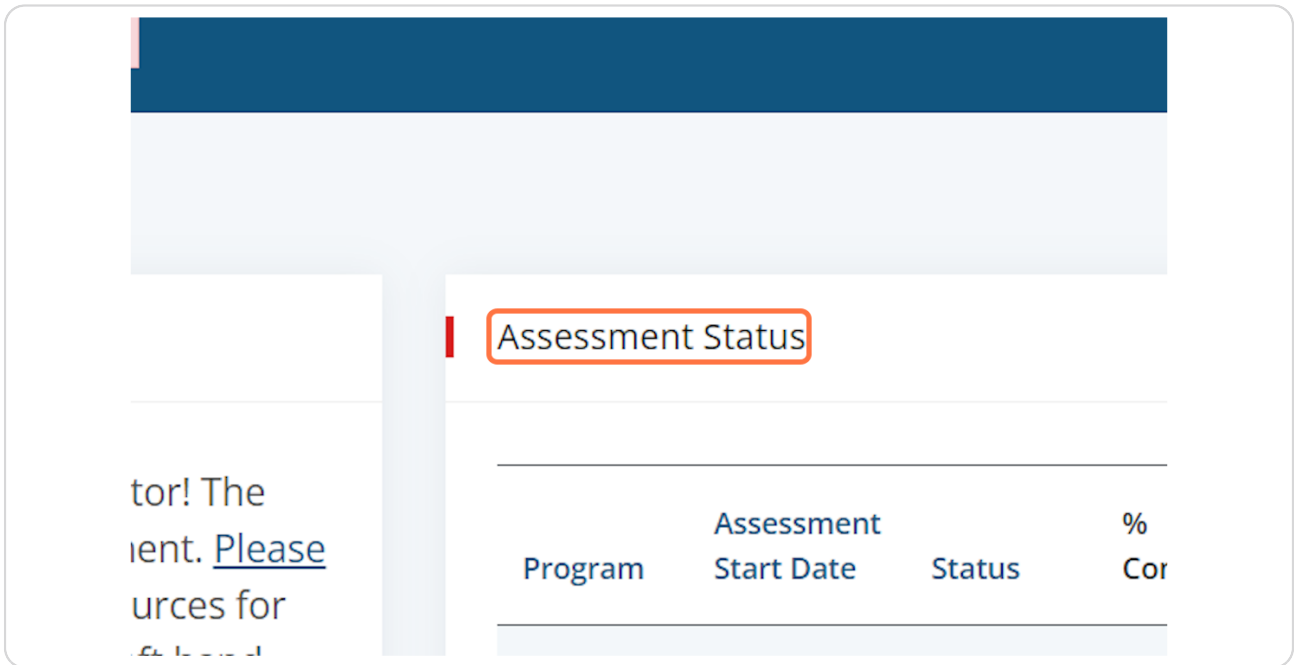
## STEP 1

Navigate to the Dashboard of the Mentoring Connector - NQMS system.



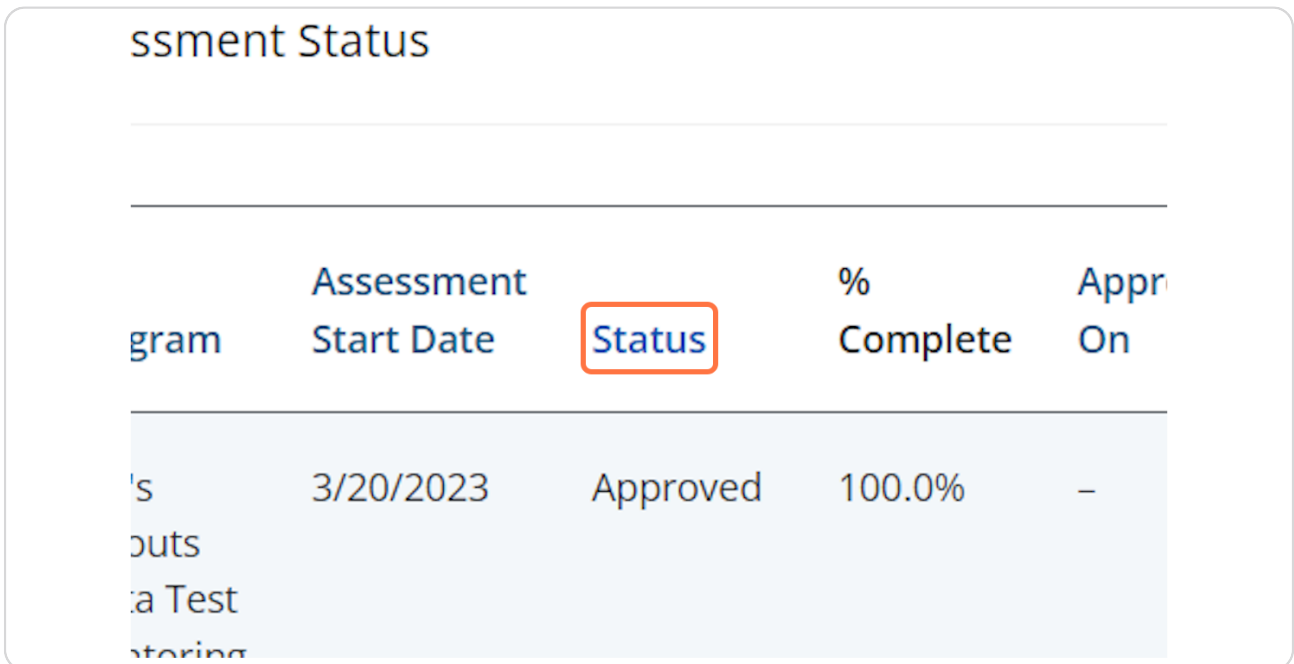
STEP 2

Find the Assessment Status widget.



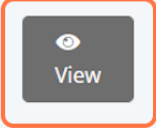
STEP 3

Sort by status to find programs that have been approved.



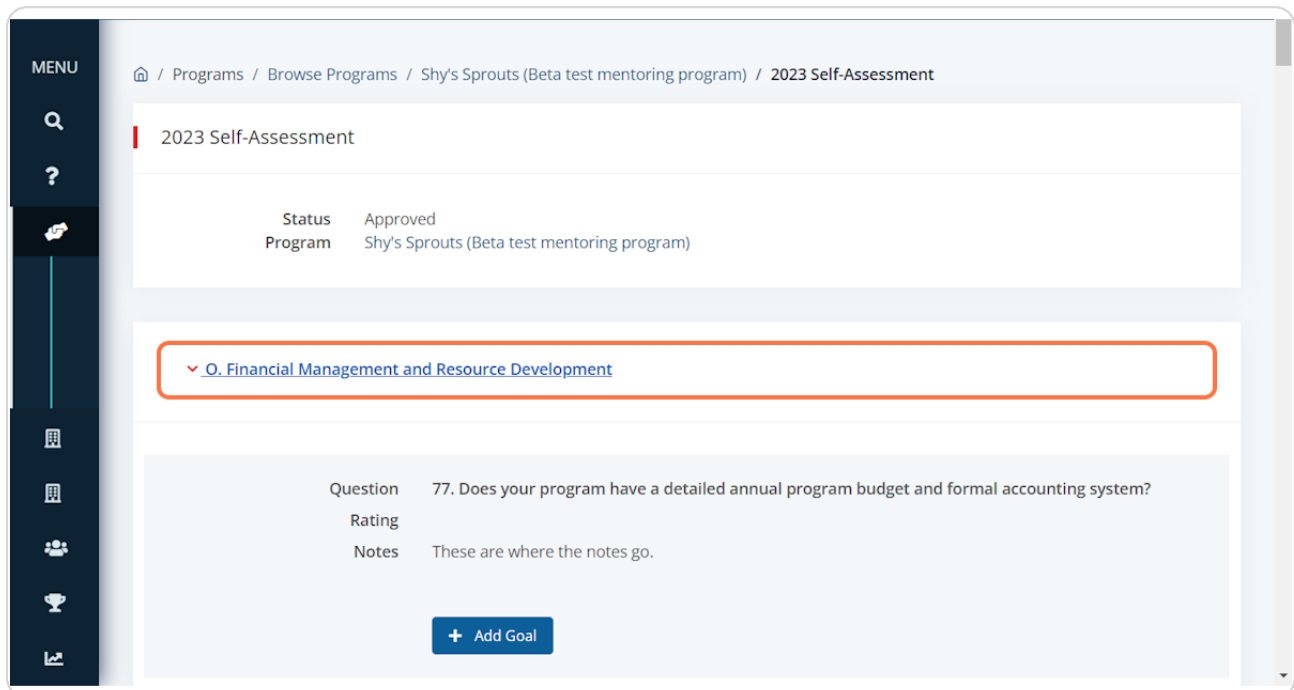
#### STEP 4

Click "View" to view the assessment of the program you'd like to create goals for.

Assessment Status					
Program	Assessment Start Date	Status	% Complete	Approved On	Actions
Shy's Sprouts (Beta Test Mentoring Program)	3/20/2023	Approved	100.0%	-	

#### STEP 5

Navigate to the section you would like to add a goal.



MENU

🏠 / Programs / Browse Programs / Shy's Sprouts (Beta test mentoring program) / 2023 Self-Assessment

### 2023 Self-Assessment

Status Approved  
Program Shy's Sprouts (Beta test mentoring program)

▼ O. Financial Management and Resource Development

Question 77. Does your program have a detailed annual program budget and formal accounting system?  
Rating  
Notes These are where the notes go.

+ Add Goal

## STEP 6

Navigate to the question you would like to add a goal to, and click "Add Goal".

fundraising efforts (i.e., detailing what kin

Rating

Notes These are where the notes go.

+ Add Goal

ral Goal Section

+ Add "

## STEP 7

Type a brief description of the goal in the "Goal Name" box.

2025 SELF-ASSESSMENT GOAL

Add Goal

79. Does your program have a code of ethics or decision-making guidelines that govern your fundraising efforts (i.e., detailing what kinds of organizations you would not accept funding from)?

Goal Name \*

Develop a policy outlining the types of gifts the program can and cannot accept|

Baseline Rating

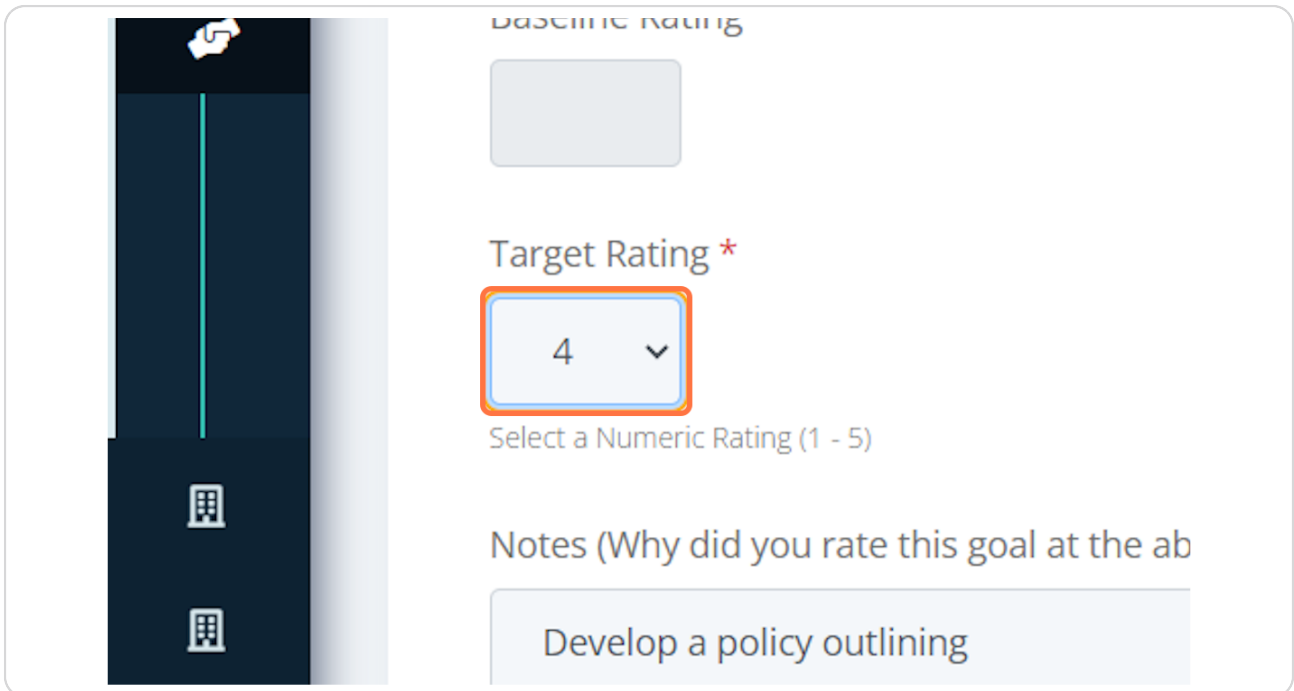
Target Rating \*

Select a Numeric Rating (1 - 5)

Notes (Why did you rate this goal at the above score?) \*

STEP 8

Select a "Target Rating" from the drop-down box.



The screenshot shows a web interface with a dark sidebar on the left containing a search icon and two list icons. The main content area has a 'BASELINE RATING' section with a grey input field. Below it is the 'Target Rating \*' section, which features a dropdown menu with the number '4' and a downward arrow. This dropdown is highlighted with a red border. Below the dropdown is the text 'Select a Numeric Rating (1 - 5)'. At the bottom is a 'Notes (Why did you rate this goal at the ab)' section with a text input field containing the text 'Develop a policy outlining'.

## STEP 9

**Include a more detailed description of the goal in the "Notes" section [if applicable].**


4

Select a Numeric Rating (1 - 5)

Notes (Why did you rate this goal at the above score?) \*

Develop a policy outlining the types of gifts the program can and cannot accept. Secure buy-in and alignment with members of the board of directors to draft a gift acceptance policy. This policy should then be voted on by the board of directors for adoption into the organization's bylaws. This policy should be clearly communicated to all staff as well. This website outlines the needs for this type of policy, how you can create and enact, and examples for reference: <https://doublethedonation.com/gift-acceptance-policy/#:-:text=A%20gift%20acceptance%20policy%20is,kind%20or%20non%2Dcash%20gifts>.

Upload Files



DRAG & DROP HERE OR CLICK

Save

## STEP 10

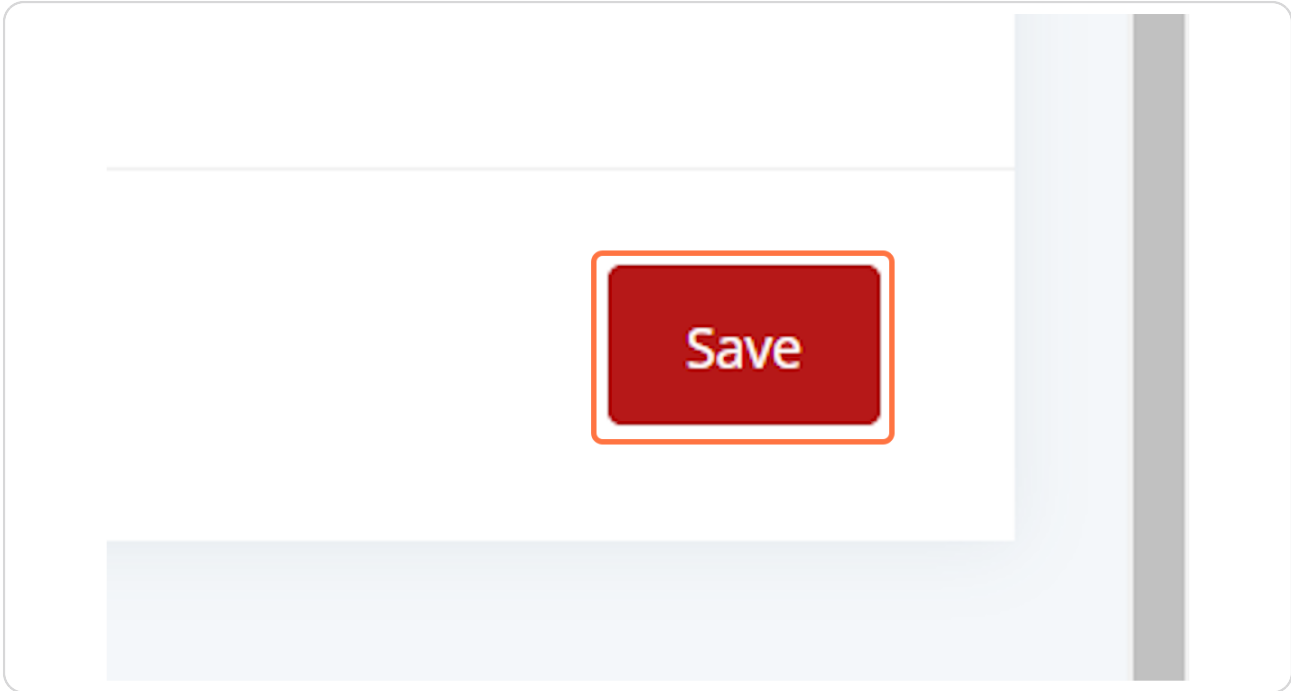
**Upload or Drag & Drop any relevant templates, tools, or resources [if applicable].**

The screenshot displays a web application interface with a dark sidebar on the left containing a logo and navigation icons. The main content area is titled "Goal Rating" and features a dropdown menu set to "4" with the text "Select a Numeric Rating (1 - 5)". Below this is a "Notes" section with a red border, containing the text: "Notes (Why did you rate this goal at the above score?) \*  
Develop a policy outlining the types of gifts the program can and cannot accept. Secure buy-in and alignment with members of the board of directors to draft a gift acceptance policy. This policy should then be voted on by the board of directors for adoption into the organization's bylaws. This policy should be clearly communicated to all staff as well. This website outlines the needs for this type of policy, how you can create and enact, and examples for reference: <https://doublethedonation.com/gift-acceptance-policy/#:-:text=A%20gift%20acceptance%20policy%20is,kind%20or%20non%2Dcash%20gifts>. See example of a policy created by the Metropolitan Museum of Art uploaded below.

Below the notes is an "Upload Files" section, also outlined in red. It contains a large dashed box with a cloud icon and the text "DRAG & DROP HERE OR CLICK". A file card is shown in the bottom left of this area, labeled "0.3 MB" and "MMA Gift Ac...", with red and blue action buttons.

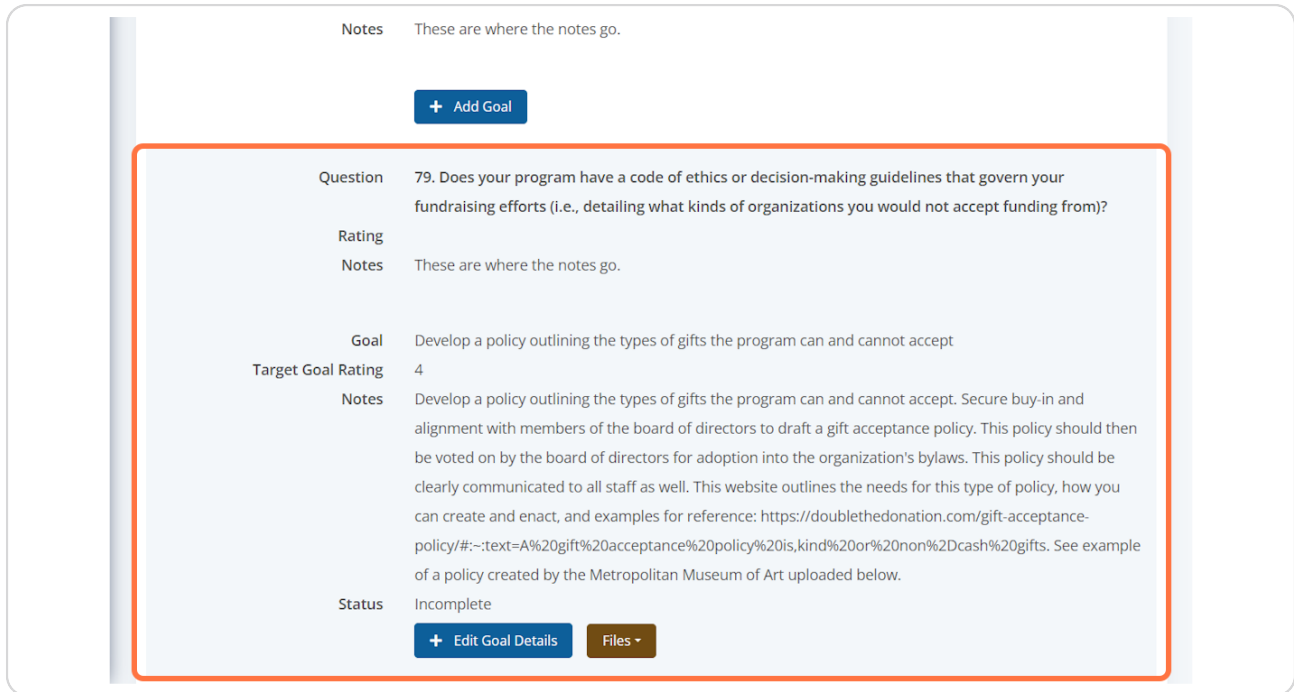
STEP 11

Click on Save



## STEP 12

Confirm the goal has saved by navigating back to the question where the goal has been added.



The screenshot shows a web interface for managing goals. At the top, there is a 'Notes' section with the text 'These are where the notes go.' and a blue '+ Add Goal' button. Below this, a question is displayed: '79. Does your program have a code of ethics or decision-making guidelines that govern your fundraising efforts (i.e., detailing what kinds of organizations you would not accept funding from)?'. Under the question, there is a 'Rating' field, a 'Notes' field with the text 'These are where the notes go.', and a 'Goal' section. The goal text is 'Develop a policy outlining the types of gifts the program can and cannot accept'. Below the goal text, there is a 'Target Goal Rating' field with the value '4', a 'Notes' field with detailed instructions on how to create and enact a policy, and a 'Status' field with the value 'Incomplete'. At the bottom of the goal section, there are two buttons: a blue '+ Edit Goal Details' button and a brown 'Files' button with a dropdown arrow.

## STEP 13

Repeat this process for the 3-5 priority items identified in the program's Improvement & Innovation Plan.

*Tango*

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