UC SAN DIEGO ADVANCEMENT
ALUMNI, ANNUAL GIVING AND PIPELINE DEVELOPMENT
ONBOARDING TRAINING

TO ACCESS TRAINING SESSIONS: LOG INTO UC LEARNING WITH YOUR AD CREDENTIALS AND SEARCH FOR THE TITLES BELOW

SUPERVISOR: ADMINISTRATIVE SUPPORT

ROLE BASED COMPETENCIES
Become familiar with the competencies and skills required to successfully perform your role. Complete your required training and THEN discuss the additional learning with your supervisor.

ADVANCEMENT COMPETENCIES
Discover the supports, context and culture the Advancement organization offers.

UC SAN DIEGO COMPETENCIES
Understanding the structures, compliance and organizational supports at UC San Diego.

EQUITY, DIVERSITY AND INCLUSION COMPETENCIES
Build your skills and understanding of equity, diversity and inclusion related to your role, the culture of Advancement and the university principles of community. Complete your required training and THEN discuss the additional learning with your supervisor.

ESSENTIAL LEARNING
- Supervising at UC San Diego
- Cash Handling
- Introduction to Oracle Procurement & Payables
- University Procurement Card Program
- University Travel and Entertainment Card Program
- Oracle: Buying and Paying for PO Requisitioners

ADDITIONAL LEARNING
- UC San Diego Travel: Before You Go

ESSENTIAL LEARNING
- Advancement: Employee Orientation
- Advancement: Data Confidentiality Training
- Advancement: Understanding Prospect Development Services for Fundraising
- ESP: 101 Constituent Records
- Advancement: ServiceNow
- ESP: Basics of Prospect Management for Fundraising
- ESP: Reports Overview
- Advancement: Athletics Compliance Training
- HIPAA Compliance for Advancement

ESSENTIAL LEARNING
- UC San Diego New Hire Orientation
- COVID-19 Prevention
- UC Cyber Security Awareness Training
- Injury and Illness Prevention
- PCI DSS Security Awareness

ESSENTIAL LEARNING
- Workplace Diversity, Equity and Inclusion in Action
- Gender Recognition: A Focus on Transgender, Nonbinary, and Intersex Awareness
- Sessions 1-5 Implicit Bias Online
- UC Preventing Harassment and Discrimination
- Compliance Briefing: UC Ethical Values and Conduct

ADDITIONAL LEARNING
- Building Inclusive Teams
UC SAN DIEGO ADVANCEMENT
ALUMNI ANNUAL GIVING AND PIPELINE DEVELOPMENT
ONBOARDING TRAINING

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SUPERVISOR: ALUMNI RELATIONS

ROLE BASED COMPETENCIES
Become familiar with the competencies and skills required to successfully perform your role. Complete your required training and THEN discuss the additional learning with your supervisor.

ADVANCEMENT COMPETENCIES
Discover the supports, context and culture the Advancement organization offers.

UC SAN DIEGO COMPETENCIES
Understanding the structures, compliance and organizational supports at UC San Diego.

EQUITY, DIVERSITY AND INCLUSION COMPETENCIES
Build your skills and understanding of equity, diversity and inclusion related to your role, the culture of Advancement and the university principles of community. Complete your required training and THEN discuss the additional learning with your supervisor.

ESSENTIAL LEARNING
- Supervising at UC San Diego
- Handshake
- FERPA: Confidentiality of Student Records & Privacy Rights
- Advancement: Athletics Compliance Training

ADDITIONAL LEARNING
- University Procurement Card Program
- University Travel and Entertainment Card Program
- UC San Diego Travel: Before You Go
- Acting with Diplomacy and Tact
- How to Influence Without Shaming as a Leader

ESSENTIAL LEARNING
- Advancement: Employee Orientation
- Advancement: Data Confidentiality Training
- ESP: 101 Constituent Records
- Advancement: ServiceNow
- HIPAA Compliance for Advancement

ADDITIONAL LEARNING
- Advancement: Understanding Prospect Development Services for Fundraising
- ESP: Reports Overview
- ESP: Basics of Prospect Management for Fundraising

ESSENTIAL LEARNING
- UC San Diego New Hire Orientation
- COVID-19 Prevention
- UC Cyber Security Awareness Training
- Injury and Illness Prevention

ESSENTIAL LEARNING
- Workplace Diversity, Equity and Inclusion in Action
- Sessions 1-5 Implicit Bias Online
- Gender Recognition: A Focus on Transgender, Nonbinary, and Intersex Awareness
- UC Preventing Harassment and Discrimination
- Compliance Briefing: UC Ethical Values and Conduct

ADDITIONAL LEARNING
- Building Inclusive Teams
Discover the supports, context and culture the Advancement organization offers.

ADVANCEMENT COMPETENCIES
Understanding the structures, compliance and organizational supports at UC San Diego.

UC SAN DIEGO COMPETENCIES
Understanding the structures, compliance and organizational supports at UC San Diego.

ROLE BASED COMPETENCIES
Become familiar with the competencies and skills required to successfully perform your role. Complete your required training and THEN discuss the additional learning with your supervisor.

ADVANCEMENT COMPETENCIES
Build your skills and understanding of equity, diversity and inclusion related to your role, the culture of Advancement and the university principles of community. Complete your required training and THEN discuss the suggested learning with your supervisor.

UC SAN DIEGO COMPETENCIES
Discover the supports, context and culture the Advancement organization offers.

TO ACCESS TRAINING SESSIONS: LOG INTO UC LEARNING WITH YOUR AD CREDENTIALS AND SEARCH FOR THE TITLES BELOW
Discover the supports, context and culture the Advancement organization offers.

ADVANCEMENT COMPETENCIES
Become familiar with the competencies and skills required to successfully perform your role.
Complete your required training and THEN discuss the additional learning with your supervisor.

ROLE BASED COMPETENCIES
Become familiar with the competencies and skills required to successfully perform your role.
Complete your required training and THEN discuss the additional learning with your supervisor.

ADVANCEMENT COMPETENCIES
Discover the supports, context and culture the Advancement organization offers.

UC SAN DIEGO COMPETENCIES
Understanding the structures, compliance and organizational supports at UC San Diego.

EQUITY, DIVERSITY AND INCLUSION COMPETENCIES
Build your skills and understanding of equity, diversity and inclusion related to your role, the culture of Advancement and the university principles of community.
Complete your required training and THEN discuss the additional learning with your supervisor.

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SUPERVISOR: STEWARDSHIP SUPPORTS

ESSENTIAL LEARNING
- SUPERVISING AT UC SAN DIEGO
- UNIVERSITY PROCUREMENT CARD PROGRAM
- UNIVERSITY TRAVEL AND ENTERTAINMENT CARD PROGRAM

ADDITIONAL LEARNING
- UC SAN DIEGO TRAVEL: BEFORE YOU GO
- SUPERVISORY LABORATORY

ESSENTIAL LEARNING
- ADVANCEMENT: EMPLOYEE ORIENTATION
- ADVANCEMENT: DATA CONFIDENTIALITY TRAINING
- ADVANCEMENT: UNDERSTANDING PROSPECT DEVELOPMENT SERVICES FOR FUNDRAISING
- ESP: 101 CONSTITUENT RECORDS
- ADVANCEMENT: SERVICENOW
- ESP: BASICS OF PROSPECT MANAGEMENT FOR FUNDRAISING
- ESP: REPORTS OVERVIEW
- ADVANCEMENT: ATHLETICS COMPLIANCE TRAINING
- HIPAA COMPLIANCE FOR ADVANCEMENT

ESSENTIAL LEARNING
- UC SAN DIEGO NEW HIRE ORIENTATION
- COVID-19 PREVENTION
- UC CYBER SECURITY AWARENESS TRAINING
- INJURY AND ILLNESS PREVENTION

ESSENTIAL LEARNING
- WORKPLACE DIVERSITY, EQUITY AND INCLUSION IN ACTION
- GENDER RECOGNITION: A FOCUS ON TRANSGENDER, NONBINARY, AND INTERSEX AWARENESS
- SESSIONS 1-5 IMPLICIT BIAS ONLINE
- UC PREVENTING HARASSMENT AND DISCRIMINATION
- COMPLIANCE BRIEFING: UC ETHICAL VALUES AND CONDUCT

ADDITIONAL LEARNING
- BUILDING INCLUSIVE TEAMS
Discover the supports, context and culture the Advancement organization offers.

ADVANCEMENT COMPETENCIES
Become familiar with the competencies and skills required to successfully perform your role. Complete your required training and THEN discuss the additional learning with your supervisor.

UC SAN DIEGO COMPETENCIES
Understanding the structures, compliance and organizational supports at UC San Diego.

EQUITY, DIVERSITY AND INCLUSION COMPETENCIES
Build your skills and understanding of equity, diversity and inclusion related to your role, the culture of Advancement and the university principles of community. Complete your required training and THEN discuss the additional learning with your supervisor.

ESSENTIAL LEARNING
- SUPERVISING AT UC SAN DIEGO
- HANDSHAKE
- FERPA: CONFIDENTIALITY OF STUDENT RECORDS & PRIVACY RIGHTS
- ADVANCEMENT: ATHLETICS COMPLIANCE TRAINING

ADDITIONAL LEARNING
- UNIVERSITY PROCUREMENT CARD PROGRAM
- UNIVERSITY TRAVEL AND ENTERTAINMENT CARD PROGRAM
- UC SAN DIEGO TRAVEL: BEFORE YOU GO
- ACTING WITH DIPLOMACY AND TACT
- HOW TO INFLUENCE WITHOUT SHAMING AS A LEADER

ESSENTIAL LEARNING
- ADVANCEMENT: EMPLOYEE ORIENTATION
- ADVANCEMENT: DATA CONFIDENTIALITY TRAINING
- ESP: 101 CONSTITUENT RECORDS
- ADVANCEMENT: SERVICENOW
- HIPAA COMPLIANCE FOR ADVANCEMENT

ADDITIONAL LEARNING
- ADVANCEMENT: UNDERSTANDING PROSPECT DEVELOPMENT SERVICES FOR FUNDRAISING
- ESP: REPORTS OVERVIEW
- ESP: BASICS OF PROSPECT MANAGEMENT FOR FUNDRAISING

ESSENTIAL LEARNING
- UC SAN DIEGO NEW HIRE ORIENTATION
- COVID-19 PREVENTION
- UC CYBER SECURITY AWARENESS TRAINING
- INJURY AND ILLNESS PREVENTION

ESSENTIAL LEARNING
- WORKPLACE DIVERSITY, EQUITY AND INCLUSION IN ACTION
- SESSIONS 1-5 IMPLICIT BIAS ONLINE
- GENDER RECOGNITION: A FOCUS ON TRANSGENDER, NONBINARY, AND INTERSEX AWARENESS
- UC PREVENTING HARASSMENT AND DISCRIMINATION
- COMPLIANCE BRIEFING: UC ETHICAL VALUES AND CONDUCT

ADDITIONAL LEARNING
- BUILDING INCLUSIVE TEAMS
UC SAN DIEGO ADVANCEMENT
ALUMNI ANNUAL GIVING AND PIPELINE DEVELOPMENT
ONBOARDING TRAINING

TO ACCESS TRAINING SESSIONS: LOG INTO UC LEARNING WITH YOUR AD CREDENTIALS AND SEARCH FOR THE TITLES BELOW

ADMINISTRATIVE SUPPORT

ROLE BASED COMPETENCIES
Become familiar with the competencies and skills required to successfully perform your role. Complete your required training and THEN discuss the additional learning with your supervisor.

ADVANCEMENT COMPETENCIES
Discover the supports, context and culture the Advancement organization offers.

UC SAN DIEGO COMPETENCIES
Understanding the structures, compliance and organizational supports at UC San Diego.

EQUITY, DIVERSITY AND INCLUSION COMPETENCIES
Build your skills and understanding of equity, diversity and inclusion related to your role, the culture of Advancement and the university principles of community. Complete your required training and THEN discuss the additional learning with your supervisor.

ESSENTIAL LEARNING
- ADVANCEMENT: CONFIDENTIALITY TRAINING
- ESP: 101 CONSTITUENT RECORDS
- ADVANCEMENT: SERVICENOW
- INTRODUCTION TO ORACLE PROCUREMENT & PAYABLES
- UNIVERSITY PROCUREMENT CARD PROGRAM
- UNIVERSITY TRAVEL AND ENTERTAINMENT CARD
- CASH HANDLING
- PCI DSS SECURITY AWARENESS

ADDITIONAL LEARNING
- ORACLE: BUYING AND PAYING FOR GOODS AND SERVICES
- ORACLE: BUYING AND PAYING FOR PO REQUISITIONERS
- UC SAN DIEGO TRAVEL: BEFORE YOU GO

ESSENTIAL LEARNING
- ADVANCEMENT: EMPLOYEE ORIENTATION
- ADVANCEMENT: ATHLETICS COMPLIANCE TRAINING
- HIPAA COMPLIANCE FOR ADVANCEMENT
- ADVANCEMENT: UNDERSTANDING PROSPECT DEVELOPMENT SERVICES FOR FUNDRAISING
- ESP: REPORTS OVERVIEW
- ESP: BASICS OF PROSPECT MANAGEMENT FOR FUNDRAISING

ESSENTIAL LEARNING
- UC SAN DIEGO NEW HIRE ORIENTATION
- COVID-19 PREVENTION
- UC CYBER SECURITY AWARENESS TRAINING
- INJURY AND ILLNESS PREVENTION

ESSENTIAL LEARNING
- WORKPLACE DIVERSITY, EQUITY AND INCLUSION IN ACTION
- UC PREVENTING HARASSMENT AND DISCRIMINATION
- GENDER RECOGNITION: A FOCUS ON TRANSGENDER, NONBINARY, AND INTERSEX AWARENESS
- SESSIONS 1-5 IMPLICIT BIAS ONLINE
- COMPLIANCE BRIEFING: UC ETHICAL VALUES AND CONDUCT
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ALUMNI/FAMILY RELATIONS

ROLE BASED COMPETENCIES
Become familiar with the competencies and skills required to successfully perform your role. Complete your required training and THEN discuss the additional learning with your supervisor.

ADVANCEMENT COMPETENCIES
Discover the supports, context and culture the Advancement organization offers. Complete your required training and THEN discuss the additional learning with your supervisor.

UC SAN DIEGO COMPETENCIES
Understanding the structures, compliance and organizational supports at UC San Diego.

EQUITY, DIVERSITY AND INCLUSION COMPETENCIES
Build your skills and understanding of equity, diversity and inclusion related to your role, the culture of Advancement and the university principles of community. Complete your required training and THEN discuss the additional learning with your supervisor.

ESSENTIAL LEARNING
- ADVANCEMENT: CONFIDENTIALITY TRAINING
- FERPA: CONFIDENTIALITY OF STUDENT RECORDS & PRIVACY RIGHTS
- HANDSHAKE
- ESP: 101 CONSTITUENT RECORDS
- ADVANCEMENT: SERVICENOW
- ADVANCEMENT: ATHLETICS COMPLIANCE TRAINING

ADDITIONAL LEARNING
- UC SAN DIEGO TRAVEL: BEFORE YOU GO
- UNIVERSITY TRAVEL AND ENTERTAINMENT CARD PROGRAM
- UNIVERSITY CARD PROCUREMENT PROGRAM

ESSENTIAL LEARNING
- ADVANCEMENT: EMPLOYEE ORIENTATION
- ADVANCEMENT: UNDERSTANDING PROSPECT DEVELOPMENT SERVICES FOR FUNDRAISING
- HIPAA COMPLIANCE FOR ADVANCEMENT

ADDITIONAL LEARNING
- ESP: REPORTS OVERVIEW
- ESP: BASICS OF PROSPECT MANAGEMENT FOR FUNDRAISING

ESSENTIAL LEARNING
- UC SAN DIEGO NEW HIRE ORIENTATION
- COVID-19 PREVENTION
- UC CYBER SECURITY AWARENESS TRAINING
- INJURY AND ILLNESS PREVENTION

ESSENTIAL LEARNING
- WORKPLACE DIVERSITY, EQUITY AND INCLUSION IN ACTION
- SESSIONS 1-5 IMPLICIT BIAS ONLINE
- GENDER RECOGNITION: A FOCUS ON TRANSGENDER, NONBINARY, AND INTERSEX AWARENESS
- COMPLIANCE BRIEFING: UC ETHICAL VALUES AND CONDUCT
- UC PREVENTING HARASSMENT AND DISCRIMINATION

ADDITIONAL LEARNING
- INCLUSIVE COMMUNICATION: A TRAINING FOR HIGHER ED LEADERS
- CREATING SAFE SPACES FOR STUDENTS BY TAKING ACTION AGAINST MICROAGGRESSIONS
Discover the supports, context and culture the Advancement organization offers.

**ADVANCEMENT COMPETENCIES**

Become familiar with the competencies and skills required to successfully perform your role. Complete your required training and THEN discuss the additional learning with your supervisor.

**UC SAN DIEGO COMPETENCIES**

Discover the structures, compliance and organizational supports at UC San Diego.

**EQUITY, DIVERSITY AND INCLUSION COMPETENCIES**

Build your skills and understanding of equity, diversity and inclusion related to your role, the culture of Advancement and the university principles of community. Complete your required training and THEN discuss the additional learning with your supervisor.

**ESSENTIAL LEARNING**

- ADVANCEMENT: CONFIDENTIALITY TRAINING
- ESP: 101 CONSTITUENT RECORDS
- ADVANCEMENT: SERVICENOW

**ESSENTIAL LEARNING**

- ADVANCEMENT: EMPLOYEE ORIENTATION
- ADVANCEMENT: ATHLETICS COMPLIANCE TRAINING
- HIPAA COMPLIANCE FOR ADVANCEMENT
- ADVANCEMENT: UNDERSTANDING PROSPECT DEVELOPMENT SERVICES FOR FUNDRAISING
- ESP: REPORTS OVERVIEW
- ESP: BASICS OF PROSPECT MANAGEMENT FOR FUNDRAISING

**ESSENTIAL LEARNING**

- UC SAN DIEGO NEW HIRE ORIENTATION
- COVID-19 PREVENTION
- UC CYBER SECURITY AWARENESS TRAINING
- INJURY AND ILLNESS PREVENTION

**ESSENTIAL LEARNING**

- WORKPLACE DIVERSITY, EQUITY AND INCLUSION IN ACTION
- UC PREVENTING HARASSMENT AND DISCRIMINATION
- GENDER RECOGNITION: A FOCUS ON TRANSGENDER, NONBINARY, AND INTERSEX AWARENESS
- SESSIONS 1-5 IMPLICIT BIAS ONLINE
- COMPLIANCE BRIEFING: UC ETHICAL VALUES AND CONDUCT

To access training sessions, log into UC Learning with your AD credentials and search for the titles below.
Discover the supports, context and culture the Advancement organization offers.

**ADVANCEMENT COMPETENCIES**

Become familiar with the competencies and skills required to successfully perform your role.

*Complete your required training and THEN discuss the additional learning with your supervisor.*

**ADVANCEMENT COMPETENCIES**

Discover the supports, context and culture the Advancement organization offers.

**UC SAN DIEGO COMPETENCIES**

Understanding the structures, compliance and organizational supports at UC San Diego.

**EQUITY, DIVERSITY AND INCLUSION COMPETENCIES**

Build your skills and understanding of equity, diversity and inclusion related to your role, the culture of Advancement and the university principles of community.

*Complete your required training and THEN discuss the additional learning with your supervisor.*

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### ESSENTIAL LEARNING

- ADVANCEMENT: CONFIDENTIALITY TRAINING
- ESP: 101 CONSTITUENT RECORDS
- ADVANCEMENT: SERVICENOW
- ADVANCEMENT: UNDERSTANDING PROSPECT DEVELOPMENT SERVICES FOR FUNDRAISING
- ESP: BASICS OF PROSPECT MANAGEMENT FOR FUNDRAISING
- ESP: REPORTS OVERVIEW
- UNIVERSITY TRAVEL AND ENTERTAINMENT CARD

### ADDITIONAL LEARNING

- ORACLE: BUYING AND PAYING FOR GOODS AND SERVICES
- UC SAN DIEGO TRAVEL: BEFORE YOU GO
- ESP: EVENTS CREATION and UPDATES (specific ESP access required)

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### ESSENTIAL LEARNING

- ADVANCEMENT: EMPLOYEE ORIENTATION
- ADVANCEMENT: ATHLETICS COMPLIANCE TRAINING
- HIPAA COMPLIANCE FOR ADVANCEMENT

### ADDITIONAL LEARNING

- FERPA - CONFIDENTIALITY OF STUDENT RECORDS AND PRIVACY RIGHTS

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### ESSENTIAL LEARNING

- UC SAN DIEGO NEW HIRE ORIENTATION
- COVID-19 PREVENTION
- UC CYBER SECURITY AWARENESS TRAINING
- INJURY AND ILLNESS PREVENTION
- ERGONOMIC OFFICE SELF-ASSESSMENT

### ADDITIONAL LEARNING

- WORKPLACE DIVERSITY, EQUITY AND INCLUSION IN ACTION
- SESSIONS 1-5 IMPLICIT BIAS ONLINE
- GENDER RECOGNITION: A FOCUS ON TRANSGENDER, NONBINARY, AND INTERSEX AWARENESS
- COMPLIANCE BRIEFING: UC ETHICAL VALUES AND CONDUCT
- UC PREVENTING HARASSMENT AND DISCRIMINATION

### ADDITIONAL LEARNING

- BRIDGING DIFFERENCES IN CROSS-CULTURAL COMMUNICATION
ADVANCEMENT COMPETENCIES
Discover the supports, context and culture the Advancement organization offers. Complete your required training and THEN discuss the additional learning with your supervisor.

UC SAN DIEGO COMPETENCIES
Understanding the structures, compliance and organizational supports at UC San Diego.

EQUITY, DIVERSITY AND INCLUSION COMPETENCIES
Build your skills and understanding of equity, diversity and inclusion related to your role, the culture of Advancement and the university principles of community.

Complete your required training and THEN discuss the additional learning with your supervisor.

ESSENTIAL LEARNING
- ADVANCEMENT: STUDENT EMPLOYEE ORIENTATION
- FERPA: CONFIDENTIALITY OF STUDENT RECORDS & PRIVACY RIGHTS
- ADVANCEMENT: CONFIDENTIALITY TRAINING
- HIPAA COMPLIANCE FOR ADVANCEMENT
- ADVANCEMENT: ATHLETICS COMPLIANCE TRAINING
- ESP: 101 CONSTITUENT RECORDS
- ADVANCEMENT: SERVICENOW

ADDITIONAL LEARNING
- ADVANCEMENT: UNDERSTANDING PROSPECT DEVELOPMENT SERVICES FOR FUNDRAISING
- ESP: BASICS OF PROSPECT MANAGEMENT FOR FUNDRAISING
- ESP: REPORTS OVERVIEW

ESSENTIAL LEARNING
- COVID-19 PREVENTION
- UC CYBER SECURITY AWARENESS TRAINING
- INJURY AND ILLNESS PREVENTION

ESSENTIAL LEARNING
- UC PREVENTING HARASSMENT AND DISCRIMINATION
- SESSIONS 1-5 IMPLICIT BIAS ONLINE
- WORKPLACE DIVERSITY, EQUITY AND INCLUSION IN ACTION
- COMPLIANCE BRIEFING: UC ETHICAL VALUES AND CONDUCT
Discover the supports, context and culture the Advancement organization offers.

Complete your required training and THEN discuss the additional learning with your supervisor.

**Role Based Competencies**
- Become familiar with the competencies and skills required to successfully perform your role.

**Advancement Competencies**
- Discover the supports, context and culture the Advancement organization offers. Complete your required training and THEN discuss the additional learning with your supervisor.

**UC San Diego Competencies**
- Understanding the structures, compliance and organizational supports at UC San Diego.

**Equity, Diversity and Inclusion Competencies**
- Build your skills and understanding of equity, diversity and inclusion related to your role, the culture of Advancement and the university principles of community. Complete your required training and THEN discuss the additional learning with your supervisor.

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