

Upon completion of the Orientation session, each docent participant will place a check mark for each item s/he is competent in and then sign and date at the bottom. This form is to be given to the docent instructor who will give it to the Gallery Committee Chair as a record of attendance.

**Opening the Gallery**

- \_\_\_\_\_ Able to unlock/lock the lockbox
- \_\_\_\_\_ Able to turning on lights and adjust temperature only (heat or A/C) - ~72/winter & ~78/summer
- \_\_\_\_\_ Able to open file cabinet in the office, set up cashbox for the day and what to do if change or smaller bills are needed
- \_\_\_\_\_ Able to perform a check of the Gallery
- \_\_\_\_\_ Able to turn on Open sign; unlock front door

**Daily Tasks**

- \_\_\_\_\_ Able to complete the Daily Sheet with all information needed
- \_\_\_\_\_ Knows the gallery: manuals; docent desk area; office; printer; storage areas
- \_\_\_\_\_ Able to greet visitors and promote "People's Choice Award"
- \_\_\_\_\_ Able to answer the phone and knows what to do with messages

**Sales**

- \_\_\_\_\_ Able to identify which items are taxable or non-taxable
- \_\_\_\_\_ Able to write up a sales invoice/receipt; \_\_\_\_\_ Completed the Receipt Handout
- \_\_\_\_\_ Able to process a cash transaction, a check transaction, and a credit-card transaction
- \_\_\_\_\_ Able to use the credit card machine and follow prompts
- \_\_\_\_\_ Able to record on the inventory and make artist call after the sale
- \_\_\_\_\_ Knows what payments are run through the gallery; and which payments are not

**Miscellaneous**

- \_\_\_\_\_ Knows where to find information
- \_\_\_\_\_ Able to take in Cards or Bin Paintings and record correctly
- \_\_\_\_\_ Knows how to use the printer as a copy machine / finding Master Copies of handouts
- \_\_\_\_\_ Able to use the call list for an emergency or unfamiliar situation
- \_\_\_\_\_ Knows to **not** rearrange or move materials in docent desk area; operations manual; office; paintings or bins; storage shelves; reception cabinets; or furniture
- \_\_\_\_\_ Knows to **not** process entry forms/payment for shows or workshops. Entry form and payment goes in the appropriate folder in the office
- \_\_\_\_\_ Knows what to do with new or renewal membership forms - see Membership section in Operations Manual

**Closing the Gallery**

- \_\_\_\_\_ Able to turn OFF sign, lights and lock front door and confirm locked
- \_\_\_\_\_ Able to count cash and put Daily Sales Baggie in lockbox and put cashbox away
- \_\_\_\_\_ Able to turn down temperature only (heat/air system) - ~70/winter & ~80/summer
- \_\_\_\_\_ Able to open lockbox, lock backdoor, secure key in lockbox and confirm door is locked

Name: (Print) \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_