

## Welcome

This document provides valuable information about how to be a Docent with the CCA Gallery. Once you get to the gallery you will find a binder in the kitchen called "**Big Gallery Binder**". All the information covered in the following contents can also be found in this binder. The binder outlines steps in bulleted or numbered lists that can be easy to follow when you need a review. Please have this binder available while you're working.

As a docent, we ask that you provide information to Gallery visitors about the following:

- Gallery hours - *currently 11am - 4pm Saturday & Sunday*
- Artists in the current show - *found in the "**Current Show**" binder.*
- Upcoming Theatre and Film events (found on our website). *At this time, any tickets for events are being purchased online and are not available at the art center.*
- Making Gallery sales using the Square device and paper receipts
- Membership renewal if someone comes in to pay their dues. *This can also be done online.*

Please be willing to discuss the information from the Current Show Binder with patrons and perhaps offer some interesting information about the artists and/or event. Be interested in their take on the art. And Thank You for not reading, eating, or going to your personal devices in front of our valued patrons.

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## How do I sign up to be a Docent?

We all use an online sign-up application called Sign-Up Genius to select the day and time you are able to be a docent. The link to this sign-up can be found on our Gallery Docents web page. The sign-up is updated for each exhibit, which usually last 7 – 8 weeks.

***We are so very grateful to all of our volunteers and could not have a Gallery without you.***

## Member Artists

As a regular Member Artist in the current show, you are requested to fill 3-4 time slots (2.5 hours each) during the show. Members who volunteer their time on a committee or event get \$5 off their entry fee. Remember, your art can't be seen/purchased unless our doors are open.

## Featured Artists

As a featured artist, you are expected to sign-up for 6 time slots during your show. This is a huge benefit to the featured artist, since they can be there to speak directly to their patrons, which generates more interest.

## Non-Artists

Maybe you love art and just want to volunteer with us. That's great! Come onboard.

Consider bringing a friend if the job seems overwhelming or to have someone who is more technology savvy to run the Square device.

You can also sign up for back-to-back time slots (5 hours) to get your commitment met in 2-3 sittings.

There is a Docent Thank You Celebration every 6 months (May/Nov), which you will be invited to! Please come meet one another, share your stories and make connections for improvement and enjoyment in being Docents at CCA.

We have Wi-Fi and recently installed a speaker with Alexa to play music. The Wi-Fi account and password are located in the kitchen on the wall by the printer. The instructions for Alexa are in the Big Gallery Binder.

Phone: We also have a phone for the Gallery that can be found in the kitchen under the safe. The phone number is 805) 927-8190. It is set up to answer all incoming calls automatically, but if someone wants to call through to the Gallery, all they need to do is enter "1" for Gallery, then "3" to ring through to the Gallery kitchen. **SO, IF THE PHONE IS RINGING, PICK IT UP!** Someone is trying to get in touch with you or someone in the Gallery!

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## What about training?

Once you've signed up, contact the Volunteer Coordinator, Sheri at [docents@CambriaArts.org](mailto:docents@CambriaArts.org) to make an appointment for an Orientation Walkthrough. These walkthroughs are held **by appointment only on Saturday at 9:00am.**

You will be meeting in the back of the Gallery building by the storage containers. You'll be given a 30-minute walkthrough and given the lockbox combination to get the key to let yourself in when it's your turn.

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## Opening & Closing

Opening the Gallery is pretty straight forward, but there are several steps to the process. Each docent is provided with a "Checklist" that outlines all the steps in the order that they should be performed.

The Checklist is on your daily sheet and can be found in the "**Daily Sheet Binder**" next to our safe in the kitchen. The keys to the art cabinets and the safe can be found in this binder as well. We recommend putting the door key here until the Gallery is being closed.

## Quick Notes about Opening

**Please arrive 15 min early to the Gallery.** Get the Gallery key from the lockbox hanging on the metal storage unit at the rear of the Gallery building. The lockbox code will be given to you during your orientation walkthrough or via email or text prior to opening. Open the back door to let yourself in. Be sure to relock the door once you're in to

prevent people from entering from this door. Test the door to be sure it's locked by pushing the door frame (not the open bar) from the inside.

1. **Kitchen:** Open the kitchen door using the same door key and place your valuables in there. Leave this door unlocked during Gallery hours, but don't leave the door wide open.
2. **Volunteer Pins:** these pins can be found on the tall kitchen cabinet board. Wear one of these during your shift and remember to put it back before you leave.
3. Find the **Daily Sheet Binder** and pull a fresh checklist sheet to use on your shift. If there is only one left, be sure to make copies before filling it out. Each sheet is two-sided.
4. **Safe:** The key (in the Daily Sheet Binder) can go in 4 different ways, but only works with one of them. There is also a notch/indentation on the upper part of the handle when in the correct position. Open the safe and get out the Gallery Money Box. Count the money and enter all the information on your Daily Sheet. Be sure to include your name, date and time.
5. **Opening Checklist:** Use this checklist to help you navigate all the tasks.
6. **Lights in Cabinets:** There are 2 keys for the 4 cabinets. Open each and turn on the lights using the switch at the right wall of each second cabinet. Close the lock, but do not completely lock it - easier to show patrons the items close at hand. (packing materials for small items can be found in the lower cabinet storage). Place the keys back in the binder.
7. **Lights in the hallways:** You learn where these 4 light switches are during the docent orientation. The Gallery lighting is the track lights, not the fluorescent lights. The track lights need to be turned on and off at each of the hallway entrances and next to the store entry. The fluorescents are automatic and come on when they sense movement.
8. Get the **Flag** out: Our new flag is quite tall and might only fit in the corner of the entry atrium.
9. **New:** Turn the Big TV Video Screen behind the reception desk. This screen is on a timer, which will turn on at 10:45 and off at 4:15 on Saturday and Sunday. If you need to turn it on at other times there is a special wall plug (small white box) behind the video screen that has an on/off button on the right side.
10. **New:** We have music in the Gallery! The speaker and Alexa device are on top of the left cabinet. This device is also on a timer, but can be turned on at other times by standing close to that area and say: "Alexa, please play (your choice of the type) music. You can also say: "Alexa, turn the volume up (or down)" and "Alexa, off". Alexa may turn off at the end of her playlist, so just ask her to play something else or replay the same playlist.
11. **Answer the phone** when it rings. Please answer calls "CCA Gallery." If someone wants to leave a message, there is a message pad next to the phone. Fill it out and place the top copy in the appropriate folder located on the side of the tall kitchen cabinet.
12. Bring out the **Big Gallery Binder** out to the reception desk to review and use as reference for making a sale and using the Square device.

13. Bring out the Artists **Current Show Binder** and review it. All the artwork and artist bios will be in here along with the red dot stickers used on the art labels to indicate an item is sold. This binder will also have artist contact information. This is not to be given out - ever. It is only to be used by the docent to contact the artist about a sale.
14. **Patron/visitor counter:** Bring out this little round clicker to help you remember how many people came into the gallery during your shift. This information will be added to your Daily Sheet at the end of your shift.
15. Be sure the **Guest Book** is out for visitors to sign for our newsletter or messages to the gallery.
16. Turn on the **Square Device Now**. Open to the main sales page ("**All Items**"). Use this for all sales. If you can't find "All Items", the device might be logged in under a different branch. Log off and log back on.
17. Have the **Paper Receipts** ready to use for ALL Sales.
18. **FINALLY, NOW YOU CAN UNLOCK THE FRONT DOORS, PUT OUT THE FLAG, AND TURN ON THE NEON OPEN SIGN.** Leave the door open if it's warm enough (best to bring a coat just in case!). The heater can be used when you're working. It should be located behind the docent desk. Please remember to turn this heater off! It was found on after hours, once, and could become a fire hazard!

## Quick Notes about Closing

If you are the last docent for the day, close at 4:00pm (or 1:30 if no other docent is coming in after you) by following the provided daily checklist, as done previously. Check when you are coming in with the Volunteer Coordinator. If no one is coming in after your shift, you might be opening and closing. You can also go back to the Sign-Up Genius link to see who is signed up after you.

1. The first thing to do is **LOCK THE DOOR**. You don't need anyone else wandering in while you're closing up.
2. **Sign Out of Square:** Do not just push the power button and put it to sleep. Don't turn it off either. It will fall asleep on its own.
3. **Turn off the heater** (if it's on).
4. Enter the amount sold, the amount of money in the cashbox, and visitor count on the Daily Sheet. **Lock the safe**. Make sure the safe key and cabinet keys are in the Daily Sheet Binder. Make note of the sales (who bought what, payment method, and disposition of the art) and email this information to [galler@CambriaArts.org](mailto:galler@CambriaArts.org). Thank you!
5. Check all doors and restroom windows by pushing on them from the inside to be sure they're locked. Turn off all the cabinet and gallery lights.
6. Be sure to put the key back in its lockbox attached to our storage container in the back of the building.
7. Please take the trash out if there is a trash can more than half full. The key to the trash is hanging on the wall above the folders in the kitchen. The trash receptacles are across the side parking lot in front of the Pickleball Courts. Thank you! You are a hero!!

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## Sales

Sales may seem daunting at first, but with a little orientation, you will get through it.

There are 5 parts to a sale:

1. The Square Device (our record for all sales)
2. The Paper Receipt (for Bookkeeper)
3. The Labeling of Sold Items.
4. Contacting the artist with the information of the sale.
  - If the artwork is not by a featured artist, that buyer can take the work on the spot. The artist then has the option to bring in another work of art to replace it. If they don't have any, the Gallery Director can decide how to fill that spot.
  - If the artwork is by a featured artist, they can choose to keep all of the artwork up through the length of the show. If the buyer is from out of town, the artist has the option to either ship it to the buyer after the show or allow them to take it early. Not all featured artists are concerned with keeping the whole show up until the end. Check the Current Show Binder for up to date information.
5. Text the website person to update the online sale.

**Startup Square:** If just plugging in the Square device, the button to turn it on is along the lower edge of the screen. If the device is on, just touch the screen to wake it up. You'll have a chance to try this during your walkthrough if needed.

### Sign On:

1. email: **docents@CambriaArts.org** (not case sensitive)
2. password: **1350Gallery** (capitalize the G of Gallery)
3. Then "Go" through the prompts to the "Checkout" / "All Items" page

If the screen is not allowing you to Sign On, Sign Out and start again. Usually, it's a simple mistake in typing the information.

### Signing Out:

1. Select the small white arrow at the center-top of the screen. Go to "Settings" / "Account" / "Sign Out"

**New Sale:** after the sale transaction is complete select "New Sale" to return to the All Items page.

**Void a Transaction:** Please refer to the Big Gallery Binder for voiding a transaction.

## MAKING A SALE

You should be at the Checkout / All Items page on Square

### Square device

1. Select Artist's name and the item they are selling. Some artists sell in more than one category of items (i.e. ceramics, painting). You can also search by artist's name to help narrow the options.
2. Type in the amount of the item (tax and total is automatic). Be sure to make note of tax and total for the paper receipt. If there are additional items, simply repeat 1 and 2.
3. When ready to accept payment:
  - **Cash:** go to Charge and add cash amount
  - **Credit Card:** go to Manual Credit Card / Charge. The patron will face the back of the computer, which has instructions for them to complete (i.e. insert card, sign, send receipt to...)
  - **Check:** More / Check. Write the name and check number then Record. All checks are to be made out to "Allied Arts."
  - Please place cash and checks with the white receipt in the cash box under the money tray (not in the blue bag) and include the information on your daily sheet.

### Paper Receipt

- Have the Patron fill out their name and phone at the top of the paper receipt.
- Write the artist's name and the item sold, the amount of the item, tax and total in the middle of the receipt.
- Include your name at the bottom and the date at the top.
- Pull out the three sales slips by sliding forward the pages (while pushing down on the metal button at the top left with a pen, or fingertip)
- White: Goes in the cash box under the money tray, but not in the blue bag.
- Yellow: Goes to the patron as their receipt
- Pink: Tape to the back of the item if the patron is not taking the piece right away. If they take the piece, put the pink slip in the pink folder in the Current show binder.
- If more than one item is sold to a patron, make copies of the receipt to attach to the back of the artwork.

### Labeling

- Write the patron's name in the Current Show Notebook next to the item purchased.
- If the item is remaining in the gallery, use one of the red dot stickers. Write the patron's initials on the sold sticker and place it on the art label next to the artwork.

Place the pink sales receipt on the back of the work with blue tape (found in the lower part of the far right art cabinet). If more than one item is sold, make copies of the receipt to attach to each item.

### **Contacting the Artist about the Sale** - Phone list in the Current Show binder

- Call the artist to let them know of the sale. If the artwork was a member artist and the patron took the piece, that artist can bring in another work of art to replace it. If the artwork is a featured artist and they want the exhibit to remain intact for the whole show, they just might like the good news. If the patron is from out of town and has to take the piece, the artist needs to be informed prior to this happening.
- Please email all sales information at the end of your shift to [galler@cambriaarts.org](mailto:galler@cambriaarts.org). Include who the buyer is, how they paid and where the art is now (did the patron take it with them or not) in your email. This will be helpful to the Gallery Financial Coordinator and the bookkeeper. Thank you so much!!

### **Text the technology coordinator about the Sale**

- Text Janet at 312-259-9698 and inform her that there has been a sale in the Gallery. She will update the status of the Virtual Gallery to indicate that the artwork has been sold.

### **Payment for new or returning MEMBERSHIP**

People who come into the Gallery when it's open often ask about becoming a member or renewing their membership. Docents can take care of these transactions as well.

1. Have the individual fill out the Membership form located in the display unit next to the kitchen door. Our information brochure is also located there if anyone would like to know more about CCA and becoming a member.
2. Log out of the Gallery account on the Square device.
3. Log into the Admin account on the Square device. The Admin login ID and password are located in the "Big Gallery Binder."
4. Select the appropriate type of membership in Square. The person might want to make a donation as well. You can add that into the transaction as a general donation. The form will identify where to put the money.
5. The completed form goes into our bookkeeper's folder in the kitchen. If they pay by credit card, there's nothing else you need to do. Check or cash payment gets attached to the membership form for the bookkeeper and goes into her folder on the side of the tall kitchen cabinet.
6. Log out of the Admin account and log back into the Gallery account on Square.

So, this is our sales system. It is easily managed with a little practice and hopefully this orientation will help. Please take in what you can, and arrive to your Docent orientation

to learn more. Many of us were overwhelmed at first, but now feel quite comfortable about the process. Just use the **Big Gallery Binder** as your Gallery Docent Bible!

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## **And Finally**

Please try to simply grasp the main concepts. All of the information you need is in the "Big Gallery Binder". So, don't worry about the details. It's all there for you in the Gallery.

As you finish up, please be sure to:

1. Replace the keys to the binder
2. Return your volunteer name tag to the kitchen pin board
3. And return the building entry key to the outside lockbox for the next Docent.

You can text the Volunteer Coordinator @ 805-434-7060 if you need support.

Please check out the "Big Gallery Binder" first to see if it might be helpful.

If you feel like you cannot meet your docent commitment, please contact Sheri and she may be able to make special arrangements for you.

Thank you for being our valued Docent, and for keeping the Gallery doors open for our artists and our community! It means so much to us.

Hope your experience will be wonderful!

Please let us know how it went! [Sheri.Parisian@CambriaArts.org](mailto:Sheri.Parisian@CambriaArts.org)