CITIZEN SPACE TRAINING
Online survey building activity

Navigate to the Delib Citizen Space demo site:

https://uk-sandbox.citizenspace.com/login
or
https://training.citizenspace.com/login

and log in using these details:-

Username: demo@delib.co.uk
Password: demo admin

TASK

This document will guide you through how to build an online consultation using Citizen Space. The example we'll use is consulting the community of 'Westonshire' about proposals for a park bridge.

INSTRUCTIONS

Step 1 – Creating your consultation

Select 'Add Consultation' in the top right of the */manage_consultations* page. Choose a title – starting with your name – and select any Department from the drop-down menu.

You now need to select the Consultation Type. For this example, select 'Online Survey'. Then select the blue button 'Add Consultation' in the bottom right.

This will bring up the **Consultation Dashboard**.

Step 2 – Editing the consultation details

Select the first link in the numbered list, called 'Edit Consultation Details', and use the following to complete each section:

Consultation Overview
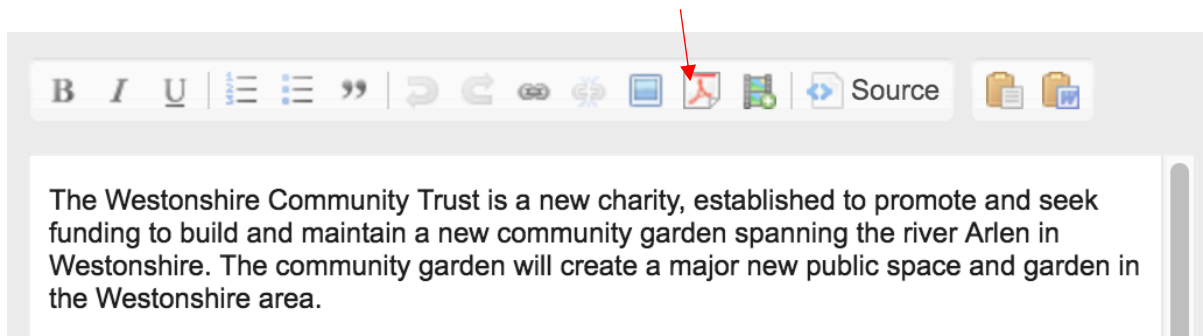**(copy and paste the below text into this section)**

The Westonshire Community Trust is a new charity, established to promote and seek funding to build and maintain a new community garden spanning the river Arlen in Westonshire. The community garden will create a major new public space and garden in the Westonshire area.
The project will only proceed if the Trust is able to raise sufficient funding to build the new bridge and maintain it in the future.
This consultation will ask your views on the proposals for the garden bridge and also for some interesting fundraising suggestions to support this project. We are particularly interested to hear any ideas that would be of benefit to the local community.
NB. All local planning issues must be resolved in accordance with the new National Planning Policy Framework – see below:

Embed a PDF at the bottom of this section using the embed tool in the WYSIWYG bar

The Westonshire Community Trust is a new charity, established to promote and seek funding to build and maintain a new community garden spanning the river Arlen in Westonshire. The community garden will create a major new public space and garden in the Westonshire area.

Why We Are Consulting
(copy and paste the below text into this section)

The Westonshire Community Trust would like to hear your views about the proposed Arlen Bridge, a new footbridge and public garden in Westonshire. Your feedback on the proposals at this early stage will help the Trust develop the Garden Bridge before the plans are finalised.
We hope to generate plenty of fundraising ideas that will help us to achieve our plans for this project, but which also might bring the local community together, such as team events or competitions.

Call To Action Heading
You can change this text to whatever you want or leave as 'Give Us Your Views'.

Owner
Select any owner from the drop-down menu.

Contact information
Fill in your details using the below Westonshire phone number and email address:
Full name:
Job Title
Team Name:
Phone: 01234 567 890
Email: DCE@westonshire.co.uk

Dates
Start Date: (use tomorrow's date)
End Date: (set open for 2 weeks)
Expected Date of Results:
Expected Date of Feedback:

Related Links
(copy and paste the below URLs)
https://www.farmgarden.org.uk/
http://www.bbc.co.uk/gardening/today_in_your_garden/community_about.shtml

Related Consultations
Leave blank or fill in as you wish.

Related Documents
Leave blank or upload a document if you would like. NB. The PDF that you embedded in the Overview section will automatically also appear here as a Related Document.

What Happens Next
(copy and paste the below text into this section)

The consultation has now closed. Thank you for your input. We will be assessing the feedback from all respondents and updating the Results on this page. So watch this space!

<u>Areas</u> – Tick the box that says 'Select Everyone'
<u>Audience</u> – Tick the box that says 'Select Everyone'
<u>Interests</u> – Select all of them

Finally, select the blue button 'Save' in the bottom right.

Step 3 – Developing your online survey

To start adding your consultation questions, select the second link in the numbered list called 'Online Survey'.

The survey you will build today will be linear, which means that respondents will complete it page-by-page in the order that you specify.

Under the heading Question Numbering you can choose how you'd like the question numbers in your survey to work. For this example, select 'Restart numbering on each page'.

<u>Introduction page</u>

The Introduction page is included by default in every new survey. It will always have three questions: name, organisation and email.

You can change/delete these questions or delete the page if you wish – we'll come back to that later in the task. (However **please note** that these questions have a special functionality built in which is very difficult to recover once they've been deleted, so **please delete them with caution**. There is no problem with moving them to other pages.)

<u>Add a new page</u>

Add a new page, by selecting the option listed in the top left menu, and call it: **Proposals for a new garden**

When you add your page title you can also add some descriptive text. Copy and paste the below text into the Description box:

Here we would like to ask you a few questions about our plans for this project.

Then select the blue button 'Add page' in the bottom right to save.

<u>Add a question</u>

Add a question, by selecting the option listed in the top left menu, and insert the below text:

> **The bridge will be designed for pedestrian access, but should the bridge be accessible to both cyclists and pedestrians?**

Then select the blue button 'Add question' in the bottom right to save.

The next screen allows you to choose from a list of different **Answer Components** that enable the respondent to provide their answer.

From the drop-down menu, choose 'Radio buttons' and then select 'Add answer component'. Enter the following options as radio answers:

Pedestrians only
Both cyclists and pedestrians

You'll also need to enter a heading for the reporting field. (This means that when you look at the response data from the consultation, the responses to this particular answer component will be shown under the heading you chose.)

Add another Answer Component, this time a 'Multiple lines text' component – size medium. Paste the below sentence into the Accessibility label:
Please provide any further comments or suggestions here:

Question 2

Use the below text to create a second question:

Please indicate how much you agree or disagree with the following statements. The Garden Bridge…

Add a 'Matrix of choices' answer component using the following possible answers and statements…

Possible answers:
Strongly agree
Agree
Neither agree nor disagree
Disagree
Strongly disagree

Statements:
Sounds like a good idea
Might be difficult to maintain
Will add value to the area
Will benefit the local community
Will benefit the local wildlife
Will bring tourists to the area
Is something I would actively use
Is not right for this area

Set the selection option to 'Radio Buttons'. This means the respondent can only select one option per statement.

Question 3

Should the garden bridge project proceed, please choose what you would like to see on the bridge from the list below:

Add a 'Fact Bank' answer component and paste the below text as the content:

We are unable to plant large trees due to the potential for future damage to the structure of the bridge. We are also unable to introduce tropical flora and fauna as it would sadly not survive in our climate.

The following options are things we could consider for the garden bridge.

Next, add a 'Checkboxes' component using the below list of answers:
British Isles flora and fauna

Wildflower area
Small trees
Lawned area
Climbing plants
Victorian-style streetlights
Floor spotlights
Tree lights
Mosaics
Graffiti wall

Lastly, add a 'Multiple lines text' component – size small, & paste the below sentence into the Accessibility label:

Please provide any further comments or suggestions here:

Page 2

Add a new page and call it: **Important features of the bridge**

Add the below introduction to the page description:

Here we would like to understand what potential features on the bridge would be most important to you.

Add question 1:

If the bridge is built, which of these features do you think we should prioritise for inclusion?

Please select the three that are most important to you in order of preference (where 1 means the most important):

Add a 'Ranking' component using the following components:
Variety of plants
Views of river
Habitat for wildlife
Seating and bins
Cycle access
Other

Use the dropdown menu to restrict the respondent to ranking only three items.

Next, add a 'Multiple lines text' component – size small, and paste the below sentence into the Accessibility label:

If you chose 'Other', please specify below:

Page 3

Add a new page and call it: **Fundraising for the project**

Add the below introduction to the page description:

Here we would like to ask you for your ideas for fundraising activities that we may run in Westonshire.

Add question 1:

Have you been involved in any fundraising activities in the past year?

Add a 'Radio buttons' answer component with the below answers:
Yes
No

Add a 'Dropdown list' answer component & in the Accessibility label paste:
If yes, please choose the type of fundraising activity you carried out most recently/frequently from the list below:

Into the answers paste:
Running event
Football event
Swimming event
Cake sale or other food-based activity
Novelty (shaving head, bath of beans etc)
Theatre/Arts event
Music event
Other

Add a 'Single-line text' component with the below Accessibility label:
If other, please type the event in this box:

Add question 2:

In the box below, please give us some ideas for fundraising activities that we could run. Feel free to be as inventive as you like!

Add a 'Multiple lines text' component – size large. In the Accessibility label paste *Please type your answer in this box* and then hide it by ticking the checkbox for 'hide this label'.

Add question 3:

We would love to see pictures and videos of your fundraising activities. You can upload images and videos of your recent fundraising here:

Add a 'File upload' component. Then add a 'Single checkbox' component & in the Accessibility label paste:
Please tick yes if you are happy for us to use these on our website.

Page 4

Add a new page and call it: **About you**

On this page we want to ask people to provide their name and email address. Those questions were automatically generated on the default Introduction page, but we can easily transfer them to page 4.

In the menu on the left-hand side, select the Introduction page and you'll see some options appear below it. Select 'Move questions'.

Using the drop-down menus underneath them, move the Name and E-mail questions to the About you page.

For the following two demographic questions, we'd encourage you to play around and choose the most appropriate way to create them. There's no right answer so it's up to you to decide what works best for you!

3. What is your ethnic group?
Please tick ONE box only to best describe your ethnic group or background:
White
British
Gypsy or Irish Traveller
Any other White background (please specify)
White and Black Caribbean
White and Black African
White and Asian
Any other Mixed / multiple ethnic background (please specify)
Indian
Pakistani
Bangladeshi
Chinese
Any other Asian background (please specify)
African
Caribbean
Any other Black / African / Caribbean background (please specify)
Any other ethnic group (please specify)
Prefer not to say

4. Do you consider yourself to have a disability? By disability we mean a physical or mental impairment that has a 'substantial' and 'long-term' negative effect on your ability to do normal daily activities (Equality Act 2010).
Yes
No
Prefer not to say

Next, add the below question using the 'Postcode' component:
5. Please provide the first part of your postcode (e.g. WD18).

Lastly, make the next question a mandatory radio button answer component, and use skip logic so that only those who answer 'yes' see page 5. You can set this up how you would like – there is no one right answer. The 'Skip logic settings' page can be reached from a link in the left-hand menu.

6. Are you responding on behalf of an organisation?
Yes
No

Page 5

Add a new page and call it: **About your organization**

Choose the most appropriate way to add the below two questions on this page.

1. What kind of organisation are you responding on behalf of?
Professional body (e.g. a Royal College)
A hospital
Charity / voluntary sector group
Patient group
Local Authority
Trade Union
Trade body
Academic organisation

Political party/Political group
GP practice or syndicate
Other (please specify)

2. What is your job title?

Move the below question from the Introduction page, as we did before with the Name and Email questions.

3. What is your organisation's name?

The default Introduction page is now redundant, since we've moved all the questions from it, so you can delete it by selecting 'Edit, move or delete this page' from the left-hand menu and selecting 'Delete this page' on the top right.

(**Please note:** the three standard questions (Name, Organisation and Email) created on the default Introduction page have a special functionality built in, so please only delete this page if 1) you've already moved the questions to another page, or 2) you're absolutely sure you don't want the functionality provided by those questions.)

Additional activity – Managing the theme of your consultation

TASK
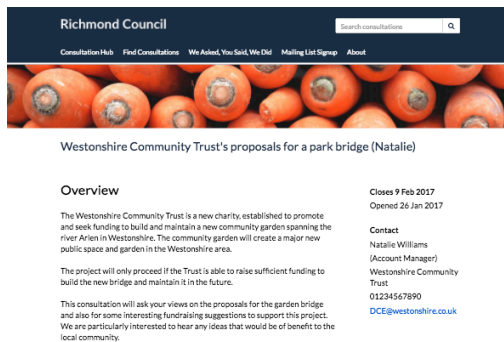
This activity will guide you through how to change the look of an individual Citizen Space consultation, giving you the opportunity to incorporate your organisation's branding or add images related to a given project or topic.

NB. You can only change the theme of a specific consultation. You cannot change the theme of your overall site, as that can only be done by Delib when requested by your site administrator.

INSTRUCTIONS

To complete this task you'll need to refer to our Zendesk article 'Managing the theme of your consultation', which can be found here: https://delib.zendesk.com/hc/en-us/articles/212216623

Using the advice provided in the Zendesk article, and the sample logo and banner images attached at the bottom of the article, follow the instructions below to test each of the theming options available to make your consultation look fantastic.

Step 1 – Manage Theme

Start on the **Consultation Dashboard** and select the fourth link in the list, 'Manage Theme'. You will see four available options for how you can customise the look of your consultation.

Apply each option by following the steps below, and use the 'Preview' box on the right-hand side to see how each option looks different.

Step 2 – Sitewide wallpaper

This is a default option and displays the same wallpaper image that appears on the hub homepage of your Citizen Space platform.

Apply this option to your consultation so you can see how it looks.

Step 3 – Full-width consultation banner

This option allows you to replace your usual site-wide wallpaper with a different image for this consultation.

Use one of the two sample banner images provided at the bottom of the Zendesk article to apply this option to your consultation so you can see how it looks: https://delib.zendesk.com/hc/en-us/articles/212216623

Step 4 – One or more logos

This option allows you to add logos specific to this consultation. It could be a single logo or image for the consultation, or the individual logos of several organisations collaborating on the project. For this option you can change the background colour to appear behind your logo(s). The default setting is white.

Use the sample logo provided at the bottom of the Zendesk article to apply this option to your consultation so you can see how it looks: https://delib.zendesk.com/hc/en-us/articles/212216623. Upload the same logo two or three times so you can see how the page applies multiple logos.

Step 5 – No banner image

You might choose this option if you wanted the consultation to have a more plain, serious look and feel. It will simply have the title of the consultation at the top of the page.

Apply this option to your consultation so you can see how it looks.

Step 3 – Save changes

Decide on which of the four options you prefer for your consultation and select the grey 'Save Changes' button in the bottom right to save your chosen theme.

CONCLUSION

Congratulations! You've just created your first consultation on Citizen Space. Hopefully completing this task has helped you to see how easy it can be and given you some ideas for how you might use it moving forward.

To see the end product of what you've created, don't forget to select 'Preview Consultation' in the top right of the Consultation Dashboard. You can do this at any point while creating a consultation and easily return to the Dashboard to make changes.

If you have any further questions today please let your trainer know, or in future please don't hesitate to drop the Account Management team a line at support@delib.net.

You'll also find lots of useful articles about how to use Citizen Space in our Knowledge Base, which can be accessed at https://delib.zendesk.com.