



2023 ANNUAL **CERTIFICATION** **EVENT**

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WELCOME

WELCOME AND THANK YOU FOR JOINING US FOR THE 2023 PUBLICINPUT ANNUAL CERTIFICATION EVENT.

All participants are eligible for Continuing Education credits through the American Planning Association

CONSULTANTS PARTICIPATING IN THIS EVENT WILL RECEIVE:

- 1-Year certification
- 1-Year access to the PublicInput sandbox to test and demonstrate your skills
- Featured listing on PublicInput.com as a Certified Consultant User
- Proof that you are ready to serve 200+ government agencies licensing PublicInput
- Bonus: License discounts!

GOVERNMENT AGENCIES PARTICIPATING IN THIS EVENT WILL RECEIVE:

- Three months of full-access* to PublicInput
- 1-Year certification
- 1-Year access to the PublicInput sandbox to test and demonstrate your skills
- Join over 200 government agencies and thousands of practitioners that use PublicInput
- Bonus: Certified user licensing rates for you and your organization

*Text messaging credits not included

HOW TO GET STARTED

Enclosed in this packet you will find assignment checklists associated with sessions 1 through 3.

These assignments represent the required activities needed to complete the certification program.

Please note session 4 is mandatory for all participants (March 10, 2023 at 2:00 PM EST). Please review the event calendar found on page 7 for other important dates and links.

LET'S GET
STARTED



LET'S GET STARTED



PLATFORM ACCESS

Soon you will receive access to the PublicInput Platform backend called Annual Certification Event. That area is only visible to you and potentially others at your organization.

If by Monday you have not received access please check your spam and/or email michael@publicinput.com

DEVELOPMENT & ONGOING VALUE

What you create during the certification event is yours to keep for the 12 months following the event.

While these projects cannot be used for full project engagement you may utilize the page and features in presentations, planning, and/or project pursuits. With this in mind, we recommend incorporating real or applicable content and information into your project to serve the dual purpose of meeting the certification requirements as well as being used for future work.

PROJECT VISIBILITY

Each participant's project page will be "published," but no one else (outside of the PublicInput Team) will have the ability to see what you have built unless the project page URL is shared with them.

REQUIREMENTS

You will see this document is broken down into the four sections below which include activities associated with each pre-scheduled live working sessions.

- Session 1: Project Pages & Surveys Made Easy
- Session 2: Weaving Equity & Accessibility into Every Effort
- Session 3: Close the Feedback Loop with Meaningful Reporting
- Session 4: Culmination Event: Making the most of PublicInput

Please Note: Session 4 is mandatory for all participants. Dates, times, and meeting links for all sessions may be found on the following page.

LET'S GET STARTED

SESSIONS & SUPPORT

We highly recommend doing a quick review of the certification requirements prior to the start of the optional virtual sessions to determine whether or not you need additional exposure/support to complete the required activities.

Need a quick answer? Check out our help articles at <https://support.publicinput.com/en/>.

Informal support will also be offered during our office hours listed on the following page.

The fourth session will be required for all participants.

LINKS & IMPORTANT DATES

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
FEB 27	28	MARCH 1	2	3
Platform Opens! Start your project! <i>Optional Session</i> 1 Walk-through @ 2PM EST Session #1 Link	Certification Office Hours: 3 – 4 PM EST Meeting Link Meeting ID: 892 1963 9173 Passcode: 747672	<i>Optional Session</i> 2 Walk-through @ 2PM EST Session #2 Link	Certification Office Hours: 10 – 11 AM EST Meeting Link Meeting ID: 899 9979 5389 Passcode: 186591	<i>Optional Session</i> 3 Walk-through @ 2PM EST Session #3 Link
6	7	8	9	10
	Certification Office Hours: 3 – 4 PM EST Meeting Link Meeting ID: 892 1963 9173 Passcode: 747672		Certification Office Hours: 10 – 11 AM EST Meeting Link Meeting ID: 899 9979 5389 Passcode: 186591	Mandatory Session 4 - Attendance Required @ 2PM EST Session #4 Link Projects due by midnight!

USEFUL INFO

Having trouble with the above hyperlinks?

No problem! Please copy/paste the below associated links into your browser to continue.

Certification Office Hours Available Tuesdays and Thursdays during the event:

Tuesday: <https://publicinput.zoom.us/j/89219639173?pwd=QktOVXEvSVhDYVVvVFhSTE9laVoyQT09>

Thursday: <https://publicinput.zoom.us/j/89999795389?pwd=Tmg0aFJzMlduUHNTcUcyMTJoOG5iQT09>

All Sessions may be accessed using the following link: <https://publicinput.com/certification>

REQUIREMENTS

To qualify for the 2023 User Certification, each participant must complete all of the requirements on the following pages.

To begin, select a theme for your project. This theme could include information or content associated with a project you might typically pursue . . . or it could be something just for fun! 100% your call. Don't forget! Anything you create here will be accessible for a year and can be used to demonstrate your knowledge and skills on future work.

PROJECT PAGES & SURVEYS MADE EASY

Whether you are updating a planning document or a neighborhood park, using project pages and survey instruments, to inform and solicit input, are two of the most common elements of an effective public engagement strategy.

During this first Certification Event session, participants will be exploring and becoming familiar with PublicInput Platform project pages and surveys.

Follow the instructions below to get started!

SESSION
1

SESSION 1

CREATE NEW ITEM

- Select Project > Create a New Project
 - Add name: Use format “Your Company - Your Name - “Certification Project”
 - Participant Anonymity: select “Allow Anonymous”
 - Add a tag: Your name (press enter)
- Add project location
 - You may use any of the following options:
 - Upload KML
 - Draw shape
 - Draw line
 - Add point
- Click “Create Project”

PROJECT SETTINGS

- Toggle “Analyze comments” to create “Smart Tag” Visualization
 - Enable/toggle other project settings as you see fit
- Create a custom link with a segment
- Click QR button next to link to save QR Code image
 - Be sure to save these to a known location. You will use them later.
- Add an administrator with “Publisher” permissions
 - You can use a colleague or alternative email.
Please do not use a fake email

PAGE & SURVEY TAB

- Add “Top-of-Page Banner” image
- Add “Icon”
- Add “Project Description”
 - Use a font and size that is different from the standard input
- Project page must include at least two steps
 - Rename them according to the content housed within
- Add a sidebar that must include at least
 - Project Timeline / Milestones
 - Status: One complete, one live, one planned
 - FAQ
 - At least one question and answer is required
 - Documents section
 - At least one document is required. Note: Documents are added at the bottom of the page.
- Create step in project named “QR Code” and add previously saved QR image
- Add at least one question of each of the follow types:
 - Quantitative
 - Open Ended
 - Participant Information
 - Geospatial
 - Interactive Map Response (Pin/Line)
 - Enable all UI options
 - Enable and use Custom Map Pins
 - Add Map Boundary
 - Show Legend
 - Demographics
 - Demographics Module

Note: You can add questions to the Demographic Module. To do this simply create a question and then in ‘options’ select to hide the question. Then you can add the hidden question to the Demographics Module.
- Add other question types as needed

SESSION 1

SESSION 1

- Use “Add Content” to insert information that aligns with your theme
- Use “Add Other” to include any YouTube Video
 - Suggestion: Something that matches your project theme or your favorite music to listen to while working
- Click the Edit button next to the tabs you named
- Toggle “Step names are clickable” > Save
 - In the same menu you may also want to explore the layout using the “Navigation Bar”
- 🚀 Publish project
- Schedule a close date of one year from today

SESSION 1 COMPLETE!

EQUITY & ACCESSIBILITY IN EVERY EFFORT

Differences like disability, age, income, language and broadband/transportation access are all important predictors of an individual's ability to participate and contribute to public engagement initiatives, particularly those that utilize only one engagement tactic. PublicInput firmly believes that equitable participation in government leads to stronger communities, cities, and a well-functioning collaborative democracy.

Tailoring engagement tactics to accommodate and include ways that make it easier for all people to provide input is key. In this session, we will dive into the accessibility and equity-based tools that support inclusion in engagement opportunities that do not require access to broadband internet or smart devices.

In the following steps, you will see how you can add offline participation options like SMS text message surveys, project phone lines for comment capture, and accessible virtual and hybrid meeting options.

This session also explores how PublicInput can pull engagement from social media so that those comments and opinions are included with the rest of the project data.

Let's get started!

SESSION 2

SESSION 2

TEXT TAB

- Enable SMS Responses
 - Edit Public Number selecting one from the dropdown
 - Add pre-survey message for participants
 - Check “Send a custom auto-reply message on survey completion”
- Add one New SMS Keywords
 - ‘Add visitors to one of the segments you previously created while configuring the project settings’
- Review Default Questions
 - You will notice some questions may not be suitable for SMS. For example, map engagement questions. Toggle ‘Disable on SMS’ any questions you do not want to be part of the text series.
- Text in and take the survey

PHONE TAB

- Enable Phone
- Enable Voicemail Comments
 - Include a ‘Recorded comment time limit’ of 60 seconds
- Customize Voicemail Intro
- Call in and leave a voicemail comment for your project

SOCIAL TAB

- Associate a Facebook post URL with this project
- Click “+Capture Post”

PROJECT SETTINGS

- Create a custom link with a segment in a language other than English

MEETINGS & OFFLINE TAB

- + Add Meeting or Event
 - Select Blank meeting
 - Add a custom name for your project meeting
 - Select Format: Hybrid
 - Add meeting location
 - Add meeting time
 - Add a tag for meeting participants
 - Add public description
 - Under More Display Options select Text message and Include in Project Milestone
 - Make Comments public
 - Under more comment options
 - Under When are comments accepted? Select always from the dropdown
 - Toggle on Allow users to include attachments
 - Attachment types to allow add PDF
- Enable Event Registration
- Under more Registration Options
 - Toggle on Send meeting registration confirmation email
 - Toggle on Send meeting reminder emails 4 hours prior to start time
- Select a Conferencing Service
 - No need to add links or details
- Select a Streaming Video provider
 - No need to add links or details
- Click ‘Save Settings’
- Under Kiosk select create a New Kiosk
 - Add a name
 - Kiosk type – select Event Sign-in Screen
 - Associate responses with your meeting
 - Add custom Opening Screen Content
 - Under Fields to collect: Show all but make required: email, first name, last name
 - Edit other options as desired then select ‘Save’
- Add a new step in your project named “Meeting”
 - Use “Add Other” to include the meeting you just created

SESSION 2

You will need participation data for the next session!
Make the most of your project by inviting friends and/
or colleagues to participate in your project.

SESSION 2 COMPLETE!

SESSION 3

CLOSE THE FEEDBACK LOOP WITH MEANINGFUL RE- PORTING

“Building trust is a process. Trust results from consistent and predictable interaction over time.”
– Barbara M. White

At PublicInput we strive to help government agencies and their consultants build trust with the communities they serve. As the quote suggests trust requires interaction and those interactions must not simply be one-way.

Another power feature of the PublicInput platform is the ability to close the feedback loop by responding to comments, re-engaging participants, and sharing engagement summaries with the public through *PublicInput Dynamic Reports*.

In this session, we will show how to automate the manual process of pulling out key perceptions, themes, and sentiments from qualitative data using our comment tagging. In addition to this, you will add transparency to your project by building a dynamic report and exploring the mass email and text message features to see how easy it is to re-engage participants and close the feedback loop.

Let's get started unlocking these powerful features now!

COMMENTS TAB

- Create at least one “Tag Multiple” auto-tag rule
- Perform at least one Reply to Multiple comment response

RESULTS & DATA TAB

- Create Dynamic Report
 - Reminder: You will need to have published your project and gathered response data to create a report with any type of summary and charts.
 - Use Default Report Name
 - Edit the graph types and layout as desired within the report
 - Add the report to a step and name the step “report”
- Data Output
 - Create 1 export file for Response Data
 - Create 1 export file for Comments

EMAIL TAB

- Enable “auto-create comments from emails”
- Send an email to a Project Email Address
- Create draft email campaign with a template that aligns with the project
 - Change Campaign Name to: your project name - EM1
 - Adjust the settings and customize auto-reply email
 - Sender name must be your own name
 - From Address: Select your project
 - Must include a question and an event
 - Recipients: Michael@publicinput.com
 - Schedule send date of 03/11/2023 1:00 PM
 - Note: This email will be used as your certification project submission. Be sure to double-check the send schedule date.

CREATE DRAFT TEXT CAMPAIGN

- Click New Campaign then select Text Messaging tab
- Must associate with your project
- Must customize text
 - Schedule send date of 03/11/2023 1:00 PM
 - Save as draft

SESSION 3



SESSION 3

PARTICIPANTS TAB

- Add Map Overview to report
- Edit at least one Participant Information to include:
 - Name
 - Email
 - Phone
 - Address
 - Manually edit their list subscriptions
 - Manually subscribe them to a segment
 - Add a New Activity
 - This creates an offline activity record and can come in quite handy during engagement projects!

SESSION 3 COMPLETE!

CULMINATION EVENT: MAKING THE MOST OF PUBLICINPUT

You have explored project pages and surveys. You have learned how to increase equity and accessibility in your projects while closing the feedback loop by transforming data into insights. In this final session you will bring it all together into one cohesive tactical plan.

Be sure to join the final required session on **March 10th, 2023 & @ 2 PM ET** to complete your certification.

In this session we will cover:

- Getting more eyeballs on your project— Marketing through social media!
- Increasing equity with Equity Mapping
- The power of topic groups and public portals
- Using the benefits you have earned through certification
- Explore licensing options
- Bonus: Access to additional training resources to dive deeper on specific topics at no cost.

SESSION
4

YOU DID IT!

YOU HAVE MADE IT THROUGH THE 2023 PUBLICINPUT ANNUAL CERTIFICATION EVENT!

Here is a quick checklist to make sure you haven't missed anything:

- Did you complete all of the Sessions 1-3 tasks? If yes, congratulations! One of your Session 3 tasks (scheduled email) will serve as your project submission! No further action is needed. If not, the deadline for completion is **Friday, March 10th at 11:59 PM EST.**
- Don't forget to attend the **REQUIRED** *Session 4: Making the most of PublicInput*. Participants that do not attend this culmination session will **not** be eligible for 2023 certification.

Following the event, Publicinput staff will begin reviewing each submission for completeness. Once verified, participants will receive notification of their certification along with a certificate that can be used to demonstrate your successful participation.

Thank you again for your active participation! If you have any questions about the use of the PublicInput platform contact our Partnership Director, Michael Murphy, today at michael@publicinput.com.