



Geek Sheet 2 - Opt-ins

Opt-in information

We've made opt-in information simpler in Lighthouse.

You can see a quick glance summary of who can contact a member and for what on a user's contact record.

F means the Federal Party can contact them using this method, S means their State Party can contact them, R means their Regional party can and L means their local party can.

This allows members to pick and choose who they want to hear from.

It is absolutely essential that you respect the opt-in preferences that are in the system.

If you think they're wrong, then the member in question should be encouraged to email help@libdems.org.uk to update them.

You can also edit opt-in preferences for your State / Region or Local Party - but you should only do this if you have a documented request from the contact in question.

- ✓ OK to contact
- ✓ OK to email
- ✓ OK to phone
- ✓ OK to send post
- ✗ Do not text
- ✓ OK to fundraise



Data Protection Best Practice

Data within Lighthouse is very secure, but once it leaves Lighthouse it becomes vulnerable to abuse. Following these basic steps can help to greatly reduce the risk.

- If you need to share a downloaded file with someone, use the pre-encrypted zip file that downloads from Lighthouse.
- Do NOT send the password that relate to encrypted files in the same email as the file. If possible send them by text or a phonecall.
- Delete any export files immediately after use. **Do not store membership data outside of Lighthouse.**
- Routinely disable accounts for users who no longer require access. You can do this in the users section.

Refer any requests from contacts to have their data removed or sent to them (known as a Subject Access Request) to data.protection@libdems.org.uk

Derived values and collated statistics (like the total number of members) are NOT considered personal data.



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The section above shows you how you can contact a member. Here's a breakdown of what each item means.

OK to contact - Tells you if a contact can be contacted. If this is crossed, the contact cannot be contacted by any means or for any reason.

Ok to email - this tells you if a contact can receive bulk or marketing email. If this is crossed, you can still send them 1 to 1 emails about their membership lapsing - but not to do things like invite them to action days or ask for donations.

OK to phone - this tells you if you can call a contact on the phone. If this is crossed you cannot call them. This preference should be respected even if Connect says you can call as it is more likely to be accurate.

OK to send post - this tells you if a member can be sent post to. If this is crossed you cannot send them post. This preference should be respected even if Connect says you can call as it is more likely to be accurate.

OK to text - this tells you if you are okay to send bulk text messages. Individual text messages may be sent even if this is crossed, but only if you follow the advice in the Whatsapp Guide, which can be found here: www.libdems.org.uk/whatsapp-guide

This will currently be set to false on all contacts and be uneditable as there are no approved bulk texting suppliers.

OK to fundraise - this tells you if you can ask a contact for money. If this is crossed, then you shouldn't ask them to make a donation or loan, although inviting them to paid events would be okay.

This opt-in means if you're sending a fundraising email and someone's fundraising opt-in is a cross, you should not send them that email.

Important:

If you think a contact's opt-ins are wrong, don't just change them. Make sure you check with the contact first and ideally get something in writing from them confirming you're okay to change them.