



Lighthouse Geek Sheet 2: Contact Preferences

Lighthouse contains a simple, easy to use summary of someone's contact preferences, both their opt-ins and their preferences about how frequently they'd like to be contacted.

You can use this information to update your other tools and systems.

Opt-in information

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

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



The left hand side shows you to the contact information for the organisation that you're currently logged in as. A tick means your current organisation can contact that person, a cross means that they can't.

You'll see on the right hand side of the screen a matrix of red and green circles and hexagons. Each shape has a letter inside it, which helps give an overview of preferences across the party.

The table below explains what each means:

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Letter	Which organisation it refers to
F	Means that the Federal Party can contact them using this method
S	Means their State Party (England, Scotland or Wales) can contact them using this method.
R	Means their Regional Party (England & Wales only) can contact them using this method.
L	Means their local party can contact them using this method.

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 the organisation you're currently logged in as. You should only do this if you have a documented request from the contact in question - as if the HQ team get a complaint, we'll need that to prove you acted correctly.

The section above shows you how you can contact a member. The next table has a breakdown of the contact channels displayed in the grid.

Opt-in Method	What it 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

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	crossed you cannot call them. For members & supporters, 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. For members & supporters, this preference should be respected even if Connect says you can call as it is more likely to be accurate.
Ok to text	<p>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:</p> <p>www.libdems.org.uk/whatsapp-guide</p> <p>This will currently be set to false on all contacts and be uneditable as there are no approved bulk texting suppliers.</p>
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.

**A 1 to 1 email is an email where you email them from your inbox, direct to them with nobody else copied in. You also need to ensure that you don't talk about anything other than their membership in that email.*

If someone is marked as "Ok to contact" but has no other opt-ins, then that means that you can knock on their door, but that's it.

Other useful information

Also in the Contact Details section and the Membership section, you'll find some useful information that should help get your communications with people right.

There's two fields that are helpful here. These are:

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Field	What it means
Frequency	<p>This field tells you how much contact someone would like from the party. It's set by users themselves, using a link included with HQ and Nationbuilder emails.</p> <p>Possible values here are Everything, Weekly, Bi-Monthly Monthly and these indicate how many times someone should hear from us in a period. IE, someone who wants to hear from us weekly should only get 1 email a week from you.</p>
Ballots by	How this person should get election ballots - users can change this preference themselves

Updating Contact Preferences

In Lighthouse, you can update contact preferences for the organisation that you're logged in as - but to change preferences more widely than that you'll need to submit a problem report.

[You can find out more on Problem Reports here.](#)

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