

Dolphin Philosophy

Chapter 1 - INTRODUCTION

- 1.1 Dolphin project comes from the idea (approved at 2006 Latina General Assembly) that Servas International needs a worldwide flexible and simple system available to all NGs (National Servas Groups),
- 1.2 This means that all NGs can keep their own database and , they can periodically download the data in Dolphin whenever they like.
- 1.3 The philosophy of Dolphin is based on the assumption that each country can define entirely its policies for entering, modifying, accessing and printing its data, defining specific internal roles and permissions.
- 1.4 Dolphin is totally accessible by other NGs, or accessible only in limited way. This means that each NG defines what can be shown on the display or in the print to all members of the **same country** or to **other Servas Countries** or specifically to **travellers**

Chapter 2 - Host Dolphin

2.1 What can you do with Host Dolphin (HD) module (which is already operative) ?

With HD each NG can:

- a. **Tailor Dolphin to its needs.**
- b. **Manage its Servas members data**
- c. **Manage & print its Host lists.**

2.2 How are members data managed in Host Dolphin?

- **HOME** - The basic block : for each “member” we keep track of the full address, and of a series of flags which define the hospitality characteristics.
- **PEOPLE** - The "living" entity: for each person in the home we track information like age, contacts, role in Servas, profession, interest, languages, personal email address, mobile phone,..... Some shared information can as well be put in the Home record.
 - In each HOME there are one or more “PEOPLE”
 - One PEOPLE can have one or more “HOME”
- **ADMINISTRATORS** - According to local policies, key people (National Secretary/President, Host list coordinator, members of Executive board, local coordinators,.....), are able to do various tasks:
 - define the country policy,
 - set up the “Permission”, ...
 - update members data
 - obtain the printed host list of her/his Country and of other Countries,

2.3 What can an individual member do after her/his data (at least name, surname, address, e-mail address) have been uploaded in HD?

- ask an user ID and password
- read the data of own country and of other countries (those who allow access)
- read her/his own data and update them (if authorized by the country policy)

2.4 What can a coordinator do (where this role exists) ?

- do all what an individual member does,
- plus
- update or input the data of new members of the region, district, city ect.. of his competence (according to his geographical area)
- download from the HD or HLSA and print the lists (or partial lists) of any country (that allows access), and give the printed pages to individual travellers.

2.5 What can a national secretary/president (NS/NP) or a member of the board do?

do all what an individual member and coordinator do, plus

- input new members and update the data of all members of her/his own country
- Generate a list in PDF format to be printed or to be uploaded into HLSA
- Update, input, cancel the data of the “Key People” of his own country in KD
- define the permission to be given to each role (Host, coordinator, etc..) both of his own country and of other countries (see the example)

2.6 What does it mean ‘to manage the Permission in HD’?

To simplify the approach for one new Country you start with the "basic standard rules" (Standard Permission for the main Roles) and then your country board can adjust these rules to your specific country policy

Example 1 - Standard Rules

Role	For people of the Same Country	For Other Servas Member
NatBoard	Read/Modify Country/ PDF Print	Read&Print/ PDF Print
Regional Coordinator	Read/ModifyRegion/Print	Read&Print
Host / dayhost/ traveller	Read&Print /ModifyOwn	Read & print only permitted fields

Example 2 - you may decide to limit the visibility:

Role	For people of the Same Country	For Other Servas Member
NatBoard	Read/Modify Country/ PDF Print	Read&Print
Host / dayhost	Read&Print	Read & print only permitted fields
Traveller	Read	Only geographical distribution

Example 3 This is an extremely private way of dealing with information.

Role	For people of the Same Country	For Other Servas Member
NatBoard	Read/Modify Country/ PDF Print	Read
Host / dayhost	Read	Only geographical distribution

Traveller	None	Only geographical distribution
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Cap 3 - Key Dolphin (KD)

3.1 Who has the permission to update or enter the data in KD?

The NS/NP of the country has this permission. The NS/NP can delegate this permission to another member of the board or also to any Servas member (giving him/her the Role of **KD Country Helper**) and adding to this role the permission of KDBA (Keydolphin Branch Administrator)

3.2 What can a national president /secretary or a member of the national board do?

- read and extract data about Servas structure all over the world and who are the members of EXCO, Committee, Teams, Areas, Countries, etc..
- Each NG can and must keep the list of its Key People updated
- upload and download the country list from HLSA
- Check the number and the data of applicants' request

Chapter 4 - The advantages of Dolphin data management

4.1 It fosters individual member's responsibility

- a- the purpose of inputting own data in an online system is to facilitate direct contacts between guests and hosts
- b- each member is the owner of her/ his own data and decides which personal info she/he wants to be visible to potential travellers
- c- each member can (and must) update her/his own data making sure the info s/he gives to potential travellers is true .

Delegating the management of own data to individual members may allows Servas to bypass some problems connected to the Privacy legislation (which changes from country to country) as Dolphin is **only a service** which:

- allows the management of own personal data
- offers a system that facilitates contacts between travellers and hosts

4.2 It decentralize tasks

- a. in case one country does not allow individual members to update own data, a local/regional coordinator will be in charge of the task thus relieving the National executive from such time consuming job

4.3 It improves precision of data and timing update

- a- If Servas wants to continue to be a reliable association it is **indispensable** to have accurate lists updated at least once a year. With paper lists such accuracy and precision of data quickly deteriorates. Being the data or the updating (inputted by individual members or by coordinators) controlled by the system, we can make sure that all data have been checked and updated before the printing of the final list

- b- in case a member's data have not been updated in due time the responsible person can send an 'alert' email to the member, or to the coordinator, and/or automatically asks to add "Not Confirmed" to this home
- c- any change in the board of a country is directly updated in KD by the country itself without asking Servas International to do the job

4.4 It saves time and money

- a- As data of own country members are available online or at least the lists can be downloaded by the HLSA, we can avoid to print the lists and send them by regular mail all over the world.
- b- The saved cost of printing and mailing could be transferred to the printing of the lists downloaded by HD or by HLSA
- c- Of course the cost of printing can be totally eliminated if travellers are allowed full access to all countries.

Chapter 5 – How to work for a better organization

5.1 **SERVAS INTERVIEW IS NOT TO BE ABANDONED**

Servas distinctive feature by which all guests and travellers become members **only after** checking that they are reliable people who share Servas spirit and values must be absolutely kept and not modified no matter how is the organisation one country chooses (paper list or online list)

5.2 **No country must be compelled to change its habits.** Any country can continue to host and travel following the traditional methods of printing the list (word document, Excel list, database, etc) and mail the list to the countries who request it, to ask and use paper stamp on LOI,

5.3 But even remaining in the traditional system **some steps forward** can be made:

- A country can choose a mixed procedure: produce paper lists in the traditional way and manage travelers with the new proposed system.
- A country can publish own list on Key Dolphin so that it can be downloaded by the host lists coordinators of other countries (80% of countries already do so)
- Those who don't trust electronic lists distributed via internet will be able to upload in HLSA a PDF copy of the list protected by a password. (but in this case how will be the password given to users? That's a problem to be solved)

Cap 6 More steps forward - The new proposal

Besides continuing to implement and improve the two existing modules of Dolphin (HD and KD), there are two more modules necessary to complete the project.

Module 1: “**Traveler Dolphin**” (TD) consists in :

- 6.1 Self- pre -registration online for candidate hosts and Travellers (Application)
 - 6.2 The system notifies the application to the most suitable Interviewers.
 - 6.3 the Interviewer contacts the candidate and the interview takes place
 - 6.4 If the host/ traveller is approved her/ his data are copied into HD
 - 6.5 If the traveler is a Servas member already registered in Host Dolphin, her/his data are already available, and the member will add only the self description to complete the LOI
 - 6.6 To handle the issue of the Electronic Letter of Introduction (ELOI) the interviewer or the responsible for the ELOI issue will:
 - A. add the validity dates (beginning and ending),
 - B. ask the TD system to carry out the numbering of the ELOI (The numbering of the letter will be done by: issuing nation/year/consecutive number in the year – and this number substitutes the stamp. WE’ll call it Virtual Stamp).
 - C. print the ELOI and authorize it with his/her signature.
 - D. Give the traveller the list of the countries he needs which are not accessible directly through Dolphin
- **The traveller can :**
 - 6.7 **Add or update his own data** (self description, address, phone number, ... ways to contact him while traveling, visited hosts, ...). Of course he cannot modify the data which have been fed into TD by the person who had issued the ELOI, nor the validity dates (beginning and ending) of the ELOI.
 - 6.8 **Interrogate directly the data of HD** (within the chosen limits of each single nation and within the validity data). If a national group doesn’t want to give data direct access in HD to the travelers, the approving person supplies the traveler with the traditional printed host lists.
 - 6.9 The traveller will have the chance to **send a message to the host** through the Dolphin system **without knowing the email address** (nor the phone, and other fields that the country has decided to hide)
 - **The host who receives the request from TD can:**
 - 6.10 **Check directly the data of the traveler in the database.** It is sufficient to know her/his name and the nation that has approved her/him or the number of the ELOI, before answering positively to a request for hosting.
 - 6.11 **In case of problems, a host can rapidly contact the person who has approved the traveler** (today, it is often impossible to read the handwriting of the person who has approved the traveler and one needs to contact the NS, which often takes long time before getting the requested information)
 - 6.12 **In case of justified and grounded reasons, the NS of the nation that has approved the traveler, can suspend her/his ELOI validity at any moment and block the access of the**

traveler to HD. The hosts can see that the traveler has been blocked and can decide accordingly on how to behave. Today, it is not possible to do so, because the traveler has a valid LOI and one doesn't know that this person has been suspended.

- **Each authorized person** (national treasurer, national secretary/president, international treasurer, ...) can at any moment know from TD:
 - 6.12 When and by who the traveler was approved
 - 6.13 How many "virtual stamps" were issued, i.e. how many ELOI were printed by each interviewer
 - 6.14 How much money an interviewer, a regional coordinator, a national group has collected (on the base of the fee that each national group wants to attribute to the stamp), and therefore how much money needs to be transferred to the national and international treasurers .

Notes: It is indispensable that NGs decide if they want to administer all travelers with Traveler Dolphin or if they want to stick to the traditional system of paper stamps. It will not be possible to do the administration in a partial way, i.e. some travelers with paper stamps and others with TD.

Module 2, **Money Dolphin (MD)**, its aims are:

- To run the statement of accounts within each national group regarding the membership fees (if there are any) of the hosts, the stamp fees of the travelers, and all other debits and credits between coordinators and national treasurer with all necessary data (date, reason, amount etc...)
- To run the statement of accounts between a national group and the treasurer of Servas International
- The bookkeeping of the virtual stamps (per interviewer ,per region, per nation)
- The expenses by the board members.

Using this module it will be easy for a country to draw its annual statement .

NOTES: Each NG will have full control and property of its statement with no interference by other countries nor by EXCO.