

# CiviCRM Service Definition

## Company profile

Circle Interactive is one of the UK's leading open source specialist agencies with strong technical, visual and UX design skills and wide experience of consulting on, implementing, hosting and supporting a range of complex web-based integrated systems, especially around CRM.

## Vision, Mission and Values

We make powerful digital engagement tools accessible to organisations with social impact. Our vision is to be a world class provider of digital systems based on Drupal, WordPress and CiviCRM.

In order to deliver on our Mission, we have identified three core values that we adhere to:

- Building Trust
- Embracing Change
- Delivering Value

We have a strong technical team with 8 developers several of whom are regular contributors to the CiviCRM community and we have been working with the product since 2006: undertaking simple and complex configuration, writing custom extensions and fixing other contributors' code. Two of our team contribute and review code for the core product so no task is too complex for us to consider. Their deep knowledge of the system can feed into discussions around your ideas and we can help you schedule work to take advantage of developments already in the pipeline.

## Brief History

The company started in Bristol in 2005, building websites and quickly became early adopters and supporters of CiviCRM. With a steady growth in demand over the years, Circle has grown its experience, customer base and staffing levels, becoming an important member of the community with a team of 20 highly experienced developers, project managers and sysadmins.

Today, we support about two hundred clients with over three hundred sites. These are NGOs and charities, international corporations, local infrastructure organisations, educational institutions and a political party.

We are confident that our experience of designing and building highly interactive user-centric sites makes us the ideal partner for developing a product that meets your requirements. From initial discovery, through build and into an ongoing support relationship, we'll be there as your partner to ensure you're able to get the most out of the technologies available.

## The service

Our project delivery team will typically comprise: a project manager, a system administrator, one senior developer and one or more other developers. They'll work in short development cycles called sprints with regular feedback opportunities so we all stay on track. This is part of our agile approach.



The first thing we do is take an in-depth look at your requirements during our discovery workshops. This is essential to understanding what problems we need to solve and how to balance the skills in our delivery team.



After discovery, we will have a detailed list of your requirements or user stories. These will form the basis of a product backlog, which will be our project manager's task list throughout the project.



We will plan the project around delivery of your Minimum Viable Product and your timescales. We'll plan sprints around your team's availability and prioritise work with your Product Owner.



During sprints we mobilise our developers to work on the product backlog for a fixed period of time. There will always be a working prototype or piece of software by the end of a sprint that you can evaluate.



After each sprint, we'll ask you to review what we've built and provide feedback. This short development cycle helps us stay on track and makes sure we're always focussed on your priorities.

## Hosting options

### SaaS Model

Suitable for most low traffic simple sites with a handful of concurrent users. This is a highly controlled environment with no server access possible.

### High Capacity Private Cloud / Dedicated Machine

Suitable for higher traffic sites, larger databases, and systems with large numbers of concurrent users. Necessary for 3rd party developer access.

## Data backup and disaster recovery

Hosting your site and CRM at Circle gives you the peace of mind that you have a team of specialists managing your system, monitoring availability, performing security updates and automated nightly backups while you focus on delivering your service. Average site uptime is greater than 99.99%.

Our backups are held on a separate network from the production environments and we run monthly restore tests to ensure we can bring systems back from disaster within a couple of hours. We run Business Continuity Plan tests a couple of times per year to ensure that we have resilience across all aspects of our operation.

## Onboarding and offboarding

We provide an onboarding service that covers service design, data migration, configuration and training. We'll provide support to users and have a library of resources, guides and documentation available. In cases where the configuration takes the system beyond normal usage, we'll provide bespoke documentation and remote training will be recorded for those who cannot attend a session or new starters in future. We encourage our clients to take full advantage of the power and flexibility of the system and provide training and support to help with this.

If you choose to end the service, we will appoint a single person to act as an Exit Manager and you should do likewise. The Circle exit manager and your exit manager would between them draw up a plan and timetable for the transfer of documentation, winding down of any services and any interim management structure that may be needed to ensure a smooth transition with minimal disruption. If interim assistance is required during or after the termination of our main services, these would be agreed as part of the plan and timing and cost of these services would form part of the overall exit plan. Our exit manager would ensure that we would provide full cooperation and effect the transition with minimal disruption. In particular they would liaise with your exit manager and ensure that all documentation is properly listed and that the transfer of all assets takes place including but not limited to: any custom code base access to all code repositories access to all production servers and test environments notes and documentation relating to development support tickets backups any encryption keys and other cryptographic controls domains

## Support desk

Our support desk operates Monday to Friday, 9am to 5pm with excellent performance in ticket response times and problem resolution. The support service is delivered via an online ticketing system where you can view FAQs, ask questions, and follow the progress of your live tickets. Your

requests will be dealt with by the most appropriate member of our team and you'll communicate directly with the people involved in resolving the issue. These will often be the people who built your system in the first place. Use our support desk to:

- book training
- report bugs
- get general help with things
- report performance issues

## Security and version upgrades

We'll apply all security updates to your software. These are minor version updates: e.g. when something goes from 5.35 to 5.36. A change from 5.37 to 6.0, is what we would consider a major upgrade and there may be an additional charge in this case as these changes can sometimes be more complex and time consuming. Updates can sometimes involve a few minutes of downtime and we'll ensure these always happen outside of UK office hours - generally between 6:30 am and 8:30 am.

We run regular scans of our network but we can also work with third party suppliers to ensure your instance undergoes regular penetration tests with the results feeding into future updates.



Circle conforms with Cyber Essentials - a UK Government Scheme that helps organisations ensure they are safe against a wide variety of cyber attacks.



Circle Interactive has been ISO 27001 certified since April 2018. This certification demonstrates our commitment to and compliance with international standards of information security.