

# M365 Email Groups, Role Inboxes & Responsibilities

Operational reference for office staff, IT admin, and future volunteers — mailing lists, shared mailboxes, licensing, SOPs, and governance.

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## Quick Overview

SHHA uses two different patterns for email collaboration:

Pattern	Technology	Examples
Committee mailing lists	Microsoft Groups	shha-all@, csc@, acc@
Role-based addresses	Shared mailboxes	president@, cscchair@, accchair@

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## Design Principles

- **Role continuity over individual ownership** — email addresses stay constant when people rotate in/out.
  - **Least cost for volunteers** — external volunteers do not require paid M365 licenses.
  - **Operational traceability** — group membership changes trigger Power Automate notifications.
  - **Institutional archive** — `itadmin@` is included in all groups as a permanent archive recipient.
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## Microsoft Groups (Mailing Lists)

Each committee has a Microsoft Group that acts as its mailing list.

Group	Address
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All members	shha-all@sandiahomeowners.org
CSC	csc@sandiahomeowners.org
ACC	acc@sandiahomeowners.org
Others	One group per committee

**Behavior:** Sending to the group distributes to all members. Membership is maintained by staff (primary owner: Anna). External participants can be included.

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## Shared Mailboxes (Role Inboxes)

Chair and executive role addresses are shared mailboxes tied to positions, not people.

Role	Address
CSC Chair	cscchair@sandiahomeowners.org
ACC Chair	accchair@sandiahomeowners.org
President	president@sandiahomeowners.org
Vice President	vicepresident@sandiahomeowners.org
Secretary	secretary@sandiahomeowners.org
Treasurer	treasurer@sandiahomeowners.org

## Access model

- People do **not** log in directly as the role mailbox.
- Authorized users open the shared mailbox from their own licensed account.
- Example: phil.krehbiel@sandiahomeowners.org can open accchair@sandiahomeowners.org.

## When leadership changes

1. Remove predecessor access.
  2. Grant successor access.
  3. Keep the role mailbox address unchanged.
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## Archive Mailbox (itadmin@)

- `itadmin@` is a member of **all** groups.
- Purpose: permanent archive and continuity.
- `itadmin@` is **not actively monitored** for normal operations.

# Power Automate Membership Notifications

A Power Automate flow sends email notifications whenever group membership changes.

- Provides audit visibility.
- Alerts staff to unexpected changes.
- Supports handoffs and troubleshooting.

# Licensing and External Volunteers

User type	License needed?	Capabilities
External volunteers	<b>No</b>	Group email delivery, SharePoint guest access
Licensed staff / admin	Yes (paid M365)	Group administration, shared mailbox access, full portal

# Responsibilities Matrix

Responsibility	Primary	Backup	Notes
Maintain committee group membership	Anna (staff)	IT admin	Add/remove members, verify accuracy
Manage shared mailbox permissions	Anna + IT admin	IT admin	Remove predecessor, add successor
Ensure <code>itadmin@</code> in all groups	IT admin	Anna	Required for archive continuity
Monitor membership-change notifications	Anna	IT admin	Power Automate emails = operational signal

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Responsibility	Primary	Backup	Notes
Troubleshoot delivery/access issues	IT admin	Anna	Includes mailbox permissions and group settings

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## SOP: Add a Person to a Committee Mailing List

1. Confirm committee and target group address.
  2. Verify whether person is internal staff or external volunteer.
  3. Add to the correct Microsoft Group membership.
  4. Confirm `itadmin@` remains a member.
  5. Verify Power Automate sends membership-change notification.
  6. Ask requester to test delivery (or send a test message).
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## SOP: Remove a Person from a Committee Mailing List

1. Confirm removal request and effective date.
  2. Remove member from the Microsoft Group.
  3. Verify Power Automate notification is received.
  4. If person held a role, check related shared mailbox permissions.
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## SOP: Leadership Transition for Role Inbox

1. Identify affected role mailbox (e.g., `accchair@`).
  2. Remove outgoing person's mailbox permissions.
  3. Grant incoming person's mailbox permissions.
  4. Validate that incoming person can open the shared mailbox from their own account.
  5. Keep address and historical content in place for continuity.
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# SOP: New Committee Creation

1. Create new Microsoft Group for the committee.
  2. Add initial committee members.
  3. Add `itadmin@` as member for archiving.
  4. Ensure membership-change notifications are active.
  5. Record the group in the committee/group inventory.
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## Governance Rules

- Every committee must have exactly one official mailing-list group.
  - Every committee group must include `itadmin@`.
  - Shared mailbox addresses represent roles and must not be treated as personal identities.
  - Access to shared role inboxes must be updated promptly on leadership change.
  - Membership changes should be performed by staff owner (Anna) or IT admin only.
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## Recommended Recordkeeping

Maintain a simple inventory table (in the wiki or internal operations file) with:

- Committee name
- Group email address
- Current chair role mailbox (if applicable)
- Current permission holders
- Last membership review date
- Last updated by

This makes volunteer/staff handoff much easier.

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## Common Issues and Checks

### Person does not receive committee emails

- Member exists in correct Microsoft Group
- Email address is correct
- Sender used the correct group address
- Recent change triggered notification (confirms update happened)

## New chair cannot open role mailbox

- Shared mailbox permission was granted to the person's licensed account
- User is opening mailbox from their own account context
- Predecessor access was removed (to avoid confusion)

## Missing archive history

- `itadmin@` is still a member of the affected group
  - Group delivery settings have not been altered
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# Handoff Checklist (Staff / Volunteer Transition)

- Review all committee group memberships for accuracy.
  - Verify all active chairs/executive roles have correct shared mailbox access.
  - Remove stale permissions from former role holders.
  - Confirm `itadmin@` is in every group.
  - Confirm membership-change notification flow is working.
  - Update inventory table and date-stamp the review.
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## Key Contacts and Ownership

Role	Contact
Group membership owner	Anna (staff)
Technical owner / escalation	IT admin
Archive mailbox	<code>itadmin@</code> (not actively monitored)

**If ownership changes, update this section immediately.**

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# Related Resources

- [M365 Email Building Blocks](#) — understand the four email patterns (personal mailbox, shared mailbox, mailing list, alias) and when to use each
  - [SOP: New Users, Mailboxes & Groups](#) — step-by-step admin procedures for creating users, shared mailboxes, groups, and aliases
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Revision #2

Created 2026-04-01 04:20:49 UTC by BookStackBot

Updated 2026-04-22 14:42:48 UTC by BookStackBot