

# Project Charter

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## Email Migration to Exchange 365

### Executive Summary

McLennan Community College (MCC) will consolidate its separate email systems, Exchange 2019 for staff and Google Workspace for students, into a unified Microsoft Exchange Online (also referred to as Office 365 and Microsoft 365) environment. This transition supports MCC's strategic goals to improve student communication, streamline processes, and invest in secure, modern campus infrastructure (2025-30 Strategic Plan, 2025).

The migration will enhance collaboration and strengthen security with multi-factor authentication (MFA), larger mailbox capacities, advanced spam and malware protection, and seamless calendar integration between Microsoft Outlook and Microsoft Teams. The project will be carried out in collaboration with college leadership and departmental stakeholders, with communication and training at its core. The estimated cost is \$36,000.

### Business Need and Background

Microsoft Exchange Server 2019, the last major on-premises release, will reach end of support on October 14, 2025. After this date, the college will no longer receive security updates, bug fixes, or technical support, leaving the platform vulnerable to security risks, compliance gaps, and potential system instability.

Currently, MCC operates staff email on Exchange 2019 and student email on Google Workspace (Gmail), creating two separate environments. This separation has caused communication friction, delays, and inconsistencies, making collaboration between students, faculty, and staff more challenging.

Higher education and enterprise IT have increasingly adopted cloud-based email solutions like Microsoft Exchange Online (part of Microsoft 365). Transitioning to a unified cloud platform eliminates the cost and complexity of maintaining on-premises servers while providing:

- Built-in redundancy and disaster recovery across Microsoft's global datacenters;
- No scheduled downtime with automatic failover and high availability with a 99.9% monthly uptime SLA (Microsoft Corporation, 2025b);
- Continuous feature and security updates without disruptive migrations;
- Seamless integration with Microsoft 365 services such as Teams, OneDrive, and SharePoint; and,
- A single, unified environment that reduces communication friction and simplifies collaboration across all users

By moving to Exchange Online, MCC aligns with industry best practices, reduces IT operational overhead, and ensures a modern, secure, and resilient communication platform that supports faculty, staff, and students in a seamless, collaborative environment.

### Strategic Benefits to MCC

Migrating to Microsoft Exchange Online (Exchange 365) aligns with MCC's 2025-2030 Strategic Plan by enhancing communication, improving operational efficiency, and supporting a modern, safe, and dynamic learning environment. Key benefits include:

- **Predictable Costs and Budget Alignment:** Moving email from a capital expense (servers, storage, upgrades) to an operational subscription expense simplifies long-term budgeting and eliminates large, periodic replacement costs.
- **Reliability and Business Continuity:** Microsoft's global redundant datacenters and 99.9% uptime SLA protect the college from outages that could disrupt faculty-student communication or administrative workflows. Disaster recovery and backups are handled by Microsoft, reducing the need for local storage investments (Microsoft Corporation, 2025b).
- **Enhanced Security:** Enterprise-grade tools—including multi-factor authentication, anti-phishing protection, and data loss prevention (DLP)—protect the college's data and help maintain compliance with regulatory standards (Microsoft Corporation, 2025a, n.d.).
- **Support for Hybrid and Remote Work:** Faculty, staff, and students can access email anywhere, on any device, supporting flexible learning, virtual office hours, and remote collaboration. Integration with Microsoft Teams, OneDrive, and SharePoint streamlines online classes and cross-departmental teamwork.
- **Continuous Innovation and Scalability:** Microsoft continuously invests in Exchange 365, providing new features, security updates, and integrations without disruptive migrations. The platform can easily scale to accommodate changes in enrollment and institutional growth.
- **Student Success and Workforce Readiness:** Students gain access to the same modern tools (Outlook, Teams, OneDrive) used in professional environments. A unified email platform fosters seamless communication between faculty, staff, and students, supporting retention, engagement, and timely responsiveness to student needs.

By consolidating email into a single, secure, and cloud-based platform, MCC enhances collaboration, streamlines operations, and ensures a resilient, future-ready communication environment that supports the success of all students and staff.

### Project Description and Scope

This project builds on the progress made in the Domain Consolidation project completed earlier this year which established the near real-time synchronization of digital identities between MCC's on-premises Active Directory and Microsoft 365 providing automatic cloud user account provisioning and deprovisioning.

The project will move MCC employee's existing Exchange 2019 mailboxes to Exchange 365 and redirect MCC's student email flow from Google's Gmail service to Exchange 365. Employees will have access to all past emails in the new environment. Students will maintain access to Gmail to be able to access their old emails for 12 months, however all new email sent and received after the migration will only be available in Exchange 365.

### In-Scope Services and Deliverables

- Conversion of user mailboxes being used as shared mailboxes to shared mailboxes.
- Configure DLP, retention, and compliance policies to match Exch. 2019.
- Develop user communications and training resources for faculty, staff, and students.
- Migration of all faculty and staff, mailboxes and calendars to Exchange 365.
- Migration of all distribution lists, shared mailboxes and calendars, and room resources to Exchange Online.
- Redirection of email addressed to MCC faculty, staff, and students Exchange 365.
- Validate mailbox migrations, mail flow, permissions, calendaring, mobile access, and integrations.
- Validate user permissions to send to All Students and All Employees distribution groups.
- Offer Help Desk support during and immediately after migration.

### Out-of-Scope Items

- Custom third-party integrations not currently in place with Exchange 2019.
- Troubleshooting underlying system issues or reconfiguration work on personally owned devices (e.g., outdated operating systems or unsupported mail clients) that prevent connection to Exchange 365.
- Project supports Windows and MacOS Outlook, Android and iOS Outlook Mobile app, and Exchange 365 webmail only.
- Service(s) that are incompatible or not modernized will not be included in this project.

### Migration Overview:

All configuration changes affecting mail flow and access will be done during a single maintenance window after which all MCC email will be sent and received through Exchange 365.

Employees will be required to restart Outlook to access their email post migration. Students will be required to configure the desktop and mobile versions of Outlook to access Exchange 365. Domain name system (DNS) configuration changes will be made to accommodate existing links redirection to Exchange 365 Outlook Web Access.

### Support Plan and Long-Term Ownership

The ISS Infrastructure Team will own and manage Exchange Online mail flow and cloud backup services post project completion.

#### Support Strategy

- Tier 1 Help Desk support for post migration reconfiguration and troubleshooting.
- Tier 2 support from the Infrastructure Team for advanced troubleshooting.
- Tier 3 support from vendor for more advanced troubleshooting.
- Ongoing training for support staff and documentation updates will be coordinated through the Infrastructure and Help Desk teams.

#### Long-Term Support Strategy

- Hardware:
  - MCC laptops and desktops will be required to support Microsoft 365.
  - Community members wishing to access email from mobile devices will be required to provide their own smart phone compatible with Outlook for iOS and Android.
  - Exchange 365 operates via cloud infrastructure, reducing MCC data center hardware requirements for future hardware life cycle replacements.
- Software:
  - Exchange 365 operates via cloud infrastructure eliminating the need for MCC ISS staff to maintain on-premises Microsoft Exchange server implementations.
- Staffing:
  - Support needs will be re-evaluated annually based on growth and incident volume.

### Project Goals

This project has four primary goals, each with measurable success metrics and alignment to MCC's strategic priorities.

#### Enhance Student Communication and Success

- **Goal:** Provide students with a modern, unified, and accessible email and collaboration environment to improve engagement, responsiveness, and access to academic resources.
- **Success Metrics:**
  - All students migrated to Microsoft Exchange 365 with Outlook, Teams, and OneDrive access.
  - Seamless integration between faculty and student email, calendar, and collaboration tools supports remote learning, virtual office hours, and academic collaboration.
- **Strategic Alignment:** Supports Enhance Student Success and Support by improving student communication, sustaining access to services, and empowering students with tools for academic success. Additionally, it prepares students for workforce readiness by providing experience with modern professional collaboration platforms.

### Enhance Security and Compliance

- **Goal:** Strengthen protection of sensitive data.
- **Success Metrics:**
  - Exchange 365 Protection enabled for all accounts.
  - DomainKeys Identified Mail (DKIM) & Domain-based Message Authentication, Reporting, and Conformance (DMARC) implemented for mclennan.edu and students.mclennan.edu email domains (Microsoft Corporation, 2025c, 2025d).
  - MFA enforced for 100% of students, faculty, and staff email.
  - DLP policies are in place and tested within 90-days.
- **Strategic Alignment:** Supports Advance Resource Support and Development by safeguarding institutional data and ensuring compliance with best practices and regulatory standards.

### Reduced Physical IT Overhead and Infrastructure Costs

- **Goal:** Lower capital expenditure requirements, shifting to operational expenditure.
- **Success Metrics:**
  - Reduction of data center hardware requirements through decreased storage and compute needs.
- **Strategic Alignment:** Supports Advance Resource Support and Development by streamlining processes, creating efficiencies, and investing in a modern, safe, and resilient campus infrastructure.

### Project Schedule

Implementation Project Schedule is aligned with MCC's academic calendar (as published at [www.mclennan.edu](http://www.mclennan.edu)) and structured to minimize disruption to academic operations. This timeline accounts for holidays, end-of-semester transitions and staff availability.

### Key Considerations & Contingencies

- No configuration changes will be planned during:
  - Fall 2025 finals week (December 6-12)
  - Winter minimester (December 16-January 2)
  - Week before start of Spring 2026 term (January 5-9)
  - First week of the Spring 2026 term (January 12-17)
- Contingency weeks built into testing and training to allow for staff absences and technical delays.
- Communication plans will be coordinated with campus leadership and public information to ensure awareness before go-live.

| PHASE                           | TIMELINE          | FISCAL YEAR | NOTES/ACADEMIC CALENDAR ALIGNMENT                                                                                                                                       |
|---------------------------------|-------------------|-------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Plan                            | October           | 2026        | Occurs after Fall Semester starts. Approval required by Administration to proceed.                                                                                      |
| Procurement                     | October-November  | 2026        |                                                                                                                                                                         |
| Project Design                  | November          | 2026        | After administration approval, vendor will be engaged to provide project timeline                                                                                       |
| Pre-migration configurations    | November-December | 2026        | Non-disruptive configuration changes identified during project design will be implemented.                                                                              |
| Convert shared mailboxes        | November-December | 2026        | User mailboxes used as shared mailboxes will be converted to shared mailboxes to align with Exchange Online licensing. Changed will be coordinated with affected users. |
| Initial Mailbox Migration       | November-December | 2026        | Conducted in the background, invisible to users. Shortens maintenance window                                                                                            |
| Cutover Maintenance and testing | December 13-15    | 2026        | Disruptive configuration changes implemented, mail during this period will be held in the SPAM filter until maintenance is complete, will last only a few hours.        |

## Project Budget

The Email Migration to Exchange Online implementation project is a professional services fixed-price engagement. This section provides a breakdown of initial implementation costs and projected post-deployment operations and maintenance (MO&E) costs over a three-year period. It also includes estimates of internal staffing costs (FTE) for support and administration.

### Budget Summary – Year 1 Implementation (FY26)

| BUDGET ITEM                | COST     | Details                                                                                                                       |
|----------------------------|----------|-------------------------------------------------------------------------------------------------------------------------------|
| Professional Services      | \$36,000 | Fixed price professional services single engagement. Costs are already included in the Required Technology budget for FY2026. |
| Full-Time Employees (FTEs) | \$15,000 | Based on estimated project work required by ISS staff                                                                         |
| Total                      | \$51,000 | Total deployment cost                                                                                                         |

### Ongoing Maintenance, Operations, and Equipment (MO&E) – FY27–FY29

| BUDGET ITEM        | FY27     | FY28     | FY29     | Details |
|--------------------|----------|----------|----------|---------|
| Software Licensing | \$79,000 | \$79,000 | \$83,000 |         |
| Total              | \$79,000 | \$79,000 | \$83,000 |         |
|                    |          |          |          |         |

**Note:** The costs of using Microsoft Exchange 365 are already a portion of the annual budget, the above costs are not additional.

## Project Management and Governance

| ROLE                                                 | NAME               | ORGANIZATION                                        |
|------------------------------------------------------|--------------------|-----------------------------------------------------|
| Executive Sponsor                                    | Johnette McKown    | President                                           |
| Executive Sponsor                                    | Chadwick Eggleston | Vice President of Instruction & Student Engagement  |
| Executive Sponsor                                    | Mark Harmsen       | Vice President of Finance & Administration          |
| Executive Sponsor                                    | Laura Wichman      | Vice President of Strategic Planning and Enrollment |
| Project Oversight                                    | Mario Leal         | Chief Information and Technology Officer            |
| Project Team (Manager)                               | Noah M. Daly       | Infrastructure Manager                              |
| Project Team (Technical Lead)                        | Joseph Park        | Infrastructure Administrator                        |
| Project Team                                         | Daylon Rankin      | Server Specialist                                   |
| Project Team                                         | Lawrence Brooks    | Network Specialist                                  |
| Cybersecurity and Online Technology Point of Contact | John Segovia       | Cybersecurity and Online Technology Manager         |
| Customer Support Services Point of Contact           | David Kuehne       | Customer Support Services Manager                   |
| Administrative Systems Point of Contact              | Vickie Peterson    | Administrative Systems Manager                      |

## Impact Analysis

The implementation of migration of email from Exchange Server 2019 to Exchange 365 will impact multiple stakeholders, business areas, and technical systems across MCC. These impacts are primarily associated with moving toward a cloud centric environment.

### Impacted Community Members

- **Community Members:** Faculty & Staff
- **Impacts:**
  - Reduced reliance on campus infrastructure improves access reliability to email.
  - Combination of cloud location and MFA protection will reduce email friction when aboard
  - Larger mailbox storage
  - Minimal disruption is expected due to advanced communications.
  - Adjustment period for web-based Outlook on the Web (OWA) interface for those used to legacy interface.
- **Community Members:** Students
- **Impacts:**
  - Seamless access through web and mobile devices with larger mailbox storage.
  - Using the same collaboration tools as faculty reduces barriers to communication and collaboration with faculty and staff
  - Alignment with tools commonly used in the workforce (Microsoft 365 ecosystem).

- **Community Members:** ISS Staff
- **Impacts:**
  - Elimination of duties required to maintain an on-premises email system frees staff to focus more on continuous improvement.
  - Shift in responsibilities from server maintenance to cloud administration, user support, and policy enforcement.

### Technical Impact

- **Infrastructure:**
  - On-premises Exchange 2019 servers will be phased out, reducing datacenter dependency.
  - Azure Active Directory integration becomes more central to identity and access management.
- **Email Services:**
  - Improved uptime (99.9% SLA) through built-in redundancy and high availability managed by service provider (Microsoft Corporation, 2025b).
  - Accessible from anywhere with an Internet connection regardless of geographic location.
- **Security:**
  - Stronger built-in security with Microsoft Defender for Office 365 scanning email databases.
  - MFA, DLP, DKIM, and encrypted email features will enhance compliance posture.
  - Cloud centric nature of service will facilitate more rapid vulnerability mitigation by service provider without intervention from ISS staff.

### Financial Impact

- **Costs reductions:**
  - Reduction of hardware life cycle replacement costs related to compute, storage, and backup infrastructure.
  - Reduction in electricity, cooling, and datacenter space usage.
  - Reduction of annual subscription costs by elimination of redundant third-party services over time.
- **Costs Incurred:**
  - Professional services required to carry out migration is already in this fiscal year's budget.



### Assumptions

These assumptions are based on current conditions, stakeholder input, and industry's best practices.

#### Technical Assumptions

1. Existing email infrastructure is stable and can support email migration with minimal modification.
2. Sufficient internet bandwidth and network capacity to handle mailbox migrations without disrupting daily operations.
3. Network configurations, firewall rules, and internal systems will allow traffic required for email migration to cloud services.
4. Recent infrastructure changes (e.g., domain migration, identity management) are stable.

#### User and Operational Assumptions

5. Migration will be well received by faculty, staff, and student population and will not change current email usage behaviors.
6. Exchange 365 is similar enough to Exchange 2019 on-premises that users and IT support staff will be able to intuit slight changes and modifications in available features and user interface.
7. Sufficient documentation and communications will be prepared to support user onboarding and self-service troubleshooting.

#### Vendor and Implementation Assumptions

8. Vendor will deliver services according to a Statement of Work (SOW), including project kickoff, discovery, configuration, testing, and knowledge transfer.
9. Licensing and support services will continue to be delivered on time without procurement delays.
10. MCC project team will provide timely responses to vendor information requests and make internal resources (cybersecurity and infrastructure staff) available as scheduled.

#### Budget and Resource Assumptions

11. Funding for initial implementation and three years of maintenance and support will remain stable.
12. Staff time allocated for implementation (e.g., projected FTE time allotments for infrastructure support roles) will be maintained throughout project.

### Constraints

This project has several constraints.

#### Time Constraints

1. Exchange 2019 goes End of Support (EoS) October 14, 2025, project must be completed as soon as possible to minimize risks due to operating on unsupported software.
  - As time passes from EoS to migration, the greater the cybersecurity risks become.
2. Migration must avoid academic disruption.
  - All procurement and scheduling must be approved and complete before October 31, 2025 to ensure migration occurs between Fall and Winter minimester 2025 academic periods.
3. Fall and winer holiday periods must be considered when scheduling, project work, training and testing.

### Resource Constraints

4. Internal staffing is limited due to user support demand, availability of technical staff outside of business hours is limited.

### Technical Constraints

5. No technical constraints are currently known.

### Vendor and Support Constraints

6. Weaver Technology's implementation timeline requires a minimum two-week notice post-purchase order before beginning work.
7. All professional services are based on standard business hours (8am–5pm CST, M–F); off-hours support requires special coordination and may incur additional costs.

### Risks

The Email Migration project at McLennan Community College faces several critical risks that must be actively monitored and mitigated.

### Data Loss During Migration

- **Risk:** Some mailbox data (emails, attachments, calendars, contacts) may not migrate completely.
- **Mitigation:**
  - Perform pre-migration data integrity checks.
  - Run pilot migrations with test accounts.
  - Maintain backups/export of Exchange 2019 databases until migration validated.

### Extended Downtime / Service Disruption during and immediately following migration

- **Risk:** Faculty, staff, or students lose email access during cutover.
- **Mitigation:**
  - Use staged/hybrid migration approach to limit downtime.
  - Students and Professors can use learning management system internal messaging service to communicate class related information during outage.
  - Employees that need to send and receive email during an extended period of email server inaccessibility can use the SPAM filter's email continuity feature by logging into <https://ess.barracudanetworks.com>.
  - Schedule cutover outside business/academic hours.
  - Provide alternate communication channels (Teams, emergency contact lines) during migration window.
  - SPAM filter will maintain disrupted emails during migration and deliver when destination email system starts accepting mail once again.
  - SPAM filter provides the ability to re-deliver any messages received 30-days prior to the email migration.

### Identity & Authentication Issues

- **Risk:** Active Directory (AD) synchronization or single sign-on (SSO) errors lock users out.
- **Mitigation:**
  - Clean up AD (UPNs, duplicates, stale accounts) before migration.
  - Test AD Connect thoroughly.
  - Pilot group validation before broad rollout.

### End-User Disruption / Adoption Resistance

- **Risk:** Users unfamiliar with Exchange 365/Outlook Web struggle with the new interface or mobile setup.
- **Mitigation:**
  - Early and clear user communication.
  - Provide quick start guides and short video tutorials.
  - Offer helpdesk surge support during and after migration.

### Client Compatibility Issues

- **Risk:** Older Outlook clients (pre-2016) or unsupported mobile devices fail to connect.
- **Mitigation:**
  - Audit all email clients in use prior to migration.
  - Upgrade incompatible clients in advance.
  - Provide instructions for users to upgrade software on home systems.
  - Outlook Web available as fallback.

### Third-Party Integration Failures

- **Risk:** Legacy applications or devices (printers, scanners, apps using simple mail transfer protocol (SMTP) relay (Microsoft Corporation, n.d.)) may fail with Exchange Online.
- **Mitigation:**
  - Inventory all SMTP-dependent apps/devices.
  - Ensure all on-premises SMTP devices are configured to use the on-premises SMTP relay server.

### DNS and Mail Flow Issues

- **Risk:** Incorrect or delayed DNS record changes disrupt inbound/outbound mail.
- **Mitigation:**
  - Validate MX, Autodiscover, SPF, DKIM, DMARC records before cutover.
  - Lower time to live (TTL) values before migration.
  - Monitor mail queues closely post-cutover.
  - Replay missing or undelivered emails through SPAM filter once any issues are resolved.

### Security Gaps Prior to Transition

- **Risk:** Weak security posture during coexistence (spam bypass, misconfigured relays, or MFA not fully enforced).
- **Mitigation:**
  - Enable Exchange 365 Protection from day one.
  - Enforce MFA for faculty/staff before full cutover.
  - Audit mail flow rules and connectors after migration.

### Performance & Bandwidth Constraints

- **Risk:** Large mailbox migrations saturate campus internet links, slowing services.
- **Mitigation:**
  - Throttle migration batches to off-peak hours.
  - Upgrade or temporarily increase bandwidth if needed.
  - Use staged hybrid migration approach instead of “big bang.”

### Compliance or Regulatory Gaps

- **Risk:** Email retention, FERPA, or HIPAA policies not enforced post-migration.
- **Mitigation:**
  - Configure retention/DLP policies in Exchange Online before migration.
  - Configure cloud backup for Exchange 365 environment before any data is migrated.
  - Test eDiscovery, journaling, and auditing features prior to migration.
  - Validate that compliance requirements are met before decommissioning Exchange 2019.

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Revision History

| Version | Date     | Updater Name    | Description                                                       |
|---------|----------|-----------------|-------------------------------------------------------------------|
| V 0.1   | 20250925 | Lawrence Brooks | Document creation.                                                |
| V 0.2   | 20251007 | Mario Leal      | Initial review, comments, and updates.                            |
| V 0.3   | 20251008 | Noah Daly       | Responded to comments and made updates.                           |
| V 1.0   | 20251015 | Mario Leal      | Review. Added one comment and made update. Ready to be published. |
|         |          |                 |                                                                   |
|         |          |                 |                                                                   |