



State of North Carolina Office of the State Controller

Michael F. Easley, Governor

Robert L. Powell, State Controller

October 31, 2007

MEMORANDUM

TO: Agency Fiscal Officers
University Vice Chancellors
Community College Business Officers

FROM: Robert L. Powell, State Controller

A handwritten signature in black ink, appearing to read "Robert L. Powell".

SUBJECT: Electronic Commerce Survey

The Office of the State Controller has been charged by the General Assembly to evaluate the opportunities for efficiencies in State government through the use of electronic commerce as it relates to both disbursement and collection of funds, and to report the results of the evaluation to the 2008 Regular Session of the 2007 General Assembly. This charge is pursuant to a special provision contained in the Appropriations Act of 2007 (Section 6.14). The provision further requires input from the entire government user base.

To accomplish the special provision's mandated requirements, the Office of the State Controller (OSC) has created a Task Force represented by various sectors of state government. The Task Force has elected to acquire the mandated input from various agencies via the survey process. Needless to say, concise input from the agencies will assist the Task Force in preparing a meaningful report to be submitted to the General Assembly.

The survey will be distributed to the three primary segments of state government: 1) General Government Agencies; 2) Universities; and 3) Community Colleges. The chief fiscal officer of each of the responding entities is being charged with the responsibility for ensuring that the survey is completed and submitted before the established deadline.

Completion and submission of the survey will be more involved than typical surveys conducted in the past. This is primarily because the survey will require substantial data gathering. The data gathering task may require researching data that has not previously been asked for by any state agency. While the task may take some effort to accomplish, management is encouraged to convey the importance of the reason for gathering the data.

The importance of obtaining data from the agencies is critical to the Task Force's mandate to prepare and submit a meaningful report to the General Assembly. The results of the study will be a report that will be the basis for a long term strategic plan to expand electronic commerce in

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state government. Such a plan first requires an assessment of the current levels of electronic commerce utilization by the various agencies, universities, and community colleges. The establishment of such a benchmark will help determine the degree of success the State has made to-date, and help identify the opportunities that are possible in the forthcoming future.

As mentioned, the survey is more involved than previous surveys that have been conducted. The process for conducting the survey is therefore more involved, and will be conducted in stages. While the survey itself will be submitted through the online Zoomerang Survey Tool, it will be necessary for the entity to first complete a “Preparation Worksheet” before the actual survey can be prepared and submitted. This is because the Zoomerang Survey must be completed and submitted within the same session. Since the survey requires substantial data gathering before the survey can be completed, OSC is providing a Preparation Worksheet to assist the entity in gathering the data. The Preparation Worksheet is in MS Word form, which allows the entity to complete the worksheet over a period of time. Once the Preparation Worksheet is completed, the data on the worksheet can then be used to input into the online Zoomerang Survey Tool. Additionally, an entity having multiple divisions or payment programs that are distinctively different may elect to prepare a worksheet each division separately.

Following are the stages and dates pertaining to the survey process:

- October 31 – Agency CFO receives informational memo advising of the survey. The memo contains a link to the State Controller’s website containing instructions for responding to the survey, as well as to the “Preparation Worksheet Template.”
- November 13 – Agency CFO receives email, containing a link to the Zoomerang Survey.
- November 30 – Agency CFO receives a follow up notice and a request for a status report on progress made on completing the survey.
- December 10 – Deadline for the survey to be submitted through the Zoomerang Tool.

More information regarding the survey process is contained in the “Survey Instructions” found at the link pertaining to the Task Force: http://www.ncosc.net/SECP/SECP_Task_Force.html

Questions regarding the survey process, including the “Preparation Worksheet” or the associated “Zoomerang Survey,” may be submitted to David Reavis, using the following email address: osc.ectask@lists.ncosc.net , or telephone (919) 871-6483.

As stated, obtaining data through this survey process is critical to the Task Force’s mandate to prepare and submit a meaningful report to the General Assembly. The attention and assistance of each chief fiscal officer is therefore greatly appreciated in this endeavor.

cc: General Government Agency Heads
Jeff Davies, UNC-General Administration
Kennon Briggs, Department of Community Colleges