



# FTA Awards Nomination/Entry Form

## Person who led this effort or project

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## About your program, idea, or project

**Name your program, idea, or project:** CDTFA Infographics  
(<https://www.cdtfa.ca.gov/dataportal/visual.htm>)

**What is the problem that you wanted to solve?** CDTFA's Research and Statistics Team (R&S Team) sought to provide on-time, on-demand, current, and accurate information to our customers, both internal and external, to assist users in making decisions. This aligns with CDTFA's core principles of working smart, serving our customers, and supporting one another.

In the summer of 2019, the CDTFA's R&S Team and Technology Services Division (TSD), created the open data portal, our public data storehouse. The R&S Team maintains and updates a vast majority of the data portal. Many of CDTFA's customers are public and private entities with data experts who utilize and analyze our data. We also have customers without data expertise who need a quick answer to their question. So, the R&S Team and TSD asked the question, how can we best serve people with our data? The answer to this question brought the idea of visualizing CDTFA's data to allow people with diverse data and statistics knowledge to navigate and get answers to specific questions with just a few clicks.

The R&S Team's creativity and experience utilizing Microsoft's Power BI brought the idea to the cutting edge of data visualization and created this world class tool! With a couple of clicks, anyone (no matter their data and/or statistics experience) can go to our California city map and retrieve information about the taxable sales for a specific business types made in that city by any quarter or year.

The Infographics is a public facing tool that allows users easily to interact with CDTFA's data that intuitively answers common questions, such as:

- How much revenue does CDTFA collect annually?
- o How has or does this change over the years?
- o Are the changes similar across the various tax and fee programs?
- How are CDTFA's revenue's distributed?
- How are California's taxable sales distributed geographically?
- o Within different regions, how do sales vary by business type (for example, gasoline stations vs. clothing retailers)?
- What is the sales tax rate where I live?
- How much revenue does CDTFA distribute to local governments?
- o How is the revenue broken down by Sales, Cultivation, Excise taxes?

**Who was involved in addressing the problem?**

CDTFA's R&S Team and Technology Services Division (TSD).

**How did they go about finding a solution?**

There were various technical innovations needed to address this issue. Data integration was developed with the CDTFA's Open Data Portal. CDTFA's R&S Team developed an Extract, Transform, Load (ETL) process by which the data was tagged appropriately so the dashboard will always report on the most up-to-date information dynamically without user/developer intervention. Additionally, the R&S Team collaborated with various departmental stakeholders to ensure relevant program data is shared appropriately.

CDTFA's R&S Team researched various tools that support infographic presentation (for example, Tableau, Power BI, etc.) and determined that Power BI supported the desired functionality.

**Describe the outcome. What is the new idea, approach, program, or activity?**

The program allows for users to access the CDTFA's online data portal with various medium platforms.

**What has changed since this was implemented? How have your operations improved? Include any data, analytics or metrics that would show the value of your program. Don't forget management advantages such as improved morale.**

The Infographics was implemented in March 2020, and the R&S Team members are already leveraging its capabilities to answer program (divisional) inquiries.

- How have operations improved? This allows the R&S Team members, as well as the public, to readily access the most recent CDTFA data available without extracting numerous datasets individually.
- Attached is a snapshot of just one of the images that the Infographics has to offer.

From April 3, 2020, to May 18, 2020, there were 443 views. The image (version) above went live the week of May 13, 2020. CDTFA is working on adding a visual to the main website that will link directly to the data visualization tool. It is anticipated that when the feature is added the traffic usage will increase.

**Is there any component of your program that makes it workable only in your state or city?**

Another agency with a similar tax type or this kind of problem could adapt or adopt this idea.

**Is this an in-house project, or did you partner with an outside vendor or service-provider?**

100% in-house

**Additional information or comments about your usage of outside vendors or service providers.**

Because the Infographics is available on our public website, the information is useful by many different stakeholders. Any agency with similar tax types could use this, and everybody should be doing this.

**What comes next – will you be adding to your program, rolling it out more widely, trying additional approaches?**

The R&S Team will be adding more granular maps, enhancing page navigation, links to external websites, and publishing the most recent fiscal year data.

## **Additional Optional Materials**

**Website/Documentation URL (Must be publicly accessible)** <https://www.cdtfa.ca.gov/dataportal/visual.htm>

**Documentation Upload**



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