



# CA FRANCHISE TAX BOARD OPEN DATA PORTAL

OCTOBER 8, 2018

# TODAY'S TOPICS

- ❑ Open Data Portal (ODP) Background
- ❑ ODP Overview – Light and Advanced
- ❑ Use Case Scenario – LA Times
- ❑ Open Data – Best Practices and Challenges

# ODP BACKGROUND

Goal: Enable Self-Service for Data Requests FTB Receives Regularly

- Reduce external special requests for existing data and reports
- Provide usable views of existing data and reports
- Reduce staff time needed to respond

Launched in July 2015

Data Hosted by Socrata

- Cloud based platform
- Our data resides in their cloud
- Produce various user-friendly views of the data

# CA.GOV OPEN DATA PORTAL

The screenshot shows the homepage of the California Open Data Portal. At the top left is the logo for CA.GOV CALIFORNIA OPEN DATA PORTAL. To the right is a search bar with the text 'search' and a magnifying glass icon. Below the logo is a navigation menu with the following items: Datasets, Topics, Groups, About, State Portals (highlighted with a red arrow), Civic Engagement, and Documentation. To the right of the menu is a 'Log in' link. The main content area features a large background image of a mountain landscape. The text 'Welcome to California Open Data' is displayed, followed by a paragraph: 'California believes in the power of unlocking government data. We invite all to search and explore our open data portal and engage with our data to create innovative solutions. We believe the California open data portal will bring government closer to citizens and start a new shared conversation for growth and progress in our great state.' A search bar is also present in this section. Below the main content are six icons representing different categories: Natural Resources (a plant), Health & Human Services (hands holding a heart), Water (a water drop), Government (a classical building), Economy and Demographics (a wallet), and Transportation (a car). At the bottom left, the word 'Partners' is visible.

# STATE OPEN DATA PORTAL WEBSITE

The screenshot shows the California Open Data Portal website. At the top, there is a search bar and a navigation menu with links for Datasets, Topics, Groups, About, State Portals, Civic Engagement, and Documentation. The main content area is titled "State Portals" and features a heading: "A listing of other open data portals maintained by the State of California". Below this heading, several logos are displayed in a grid:

- OPENJUSTICE**
- OPEN BOE** BEST OF CALIFORNIA 2013 WINNER
- EDD** Employment Development Department State of California
- California State Treasurer **John Chiang** (with a small portrait photo)
- FTB** STATE OF CALIFORNIA Franchise Tax Board (EST. 1913)
- CALIFORNIA natural resources AGENCY**
- CHHS** Open Data
- Controller Betty T. Yee** California State Controller's Office

# ODP LIGHT OVERVIEW

## Geared toward non-technical users

- Less Options
- Various Pre-Set Views Easily Accessed
- Meets Accessibility Standards

Open Data Portal – Light: <https://www.ftb.ca.gov/Data/>

# ODP LIGHT

The screenshot shows the website for the State of California Franchise Tax Board's Open Data | Light portal. The header includes the CA.GOV logo, the FTB logo (EST. 1948), and the text "STATE OF CALIFORNIA Franchise Tax Board". A search bar with a magnifying glass icon and the text "Search" and "Archive Site" is located in the top right. A navigation bar below the header contains a home icon, "Individuals", "Businesses", "Tax Professionals", and "Contact Us". The main content area features a large dark banner with the text "Open Data | Light" in orange. Below this, there are four sections: "Individuals", "Businesses", "Tax Expenditure", and "Resources". The "Individuals" section is highlighted with a red arrow pointing to the first item in its list of common datasets.

**CA.GOV** **FTB** STATE OF CALIFORNIA **Franchise Tax Board** Search  Archive Site

[Home](#) **Individuals** **Businesses** **Tax Professionals** **Contact Us**

## Open Data | Light

### Individuals

Common datasets:

- [Personal Income Tax, by ZIP Code](#)
- [Adjusted Gross Income, by County: Table | Chart](#)
- [Adjusted Gross Income Class Comparison, All Filing Statuses: Table | Chart](#)
- [Adjusted Gross Income Data Categories](#)

**ALL INDIVIDUALS DATA**

### Businesses

Common datasets:

- [Tax Rates, by Corporation Type: Table | Chart](#)
- [Income, Loss, and Tax Assessed, by Taxable Year: Table | Chart](#)
- [Corporation Tax Credits Allowed By Corporation Type: Table | Chart](#)
- [Tax Credits Allowed, All Corporations: Table | Chart](#)

**ALL BUSINESS DATA**

### Tax Expenditure

### Resources



# ODP LIGHT EXAMPLE

## Adjusted Gross Income (AGI) Data Categories

Choose a topic from the list for more details.

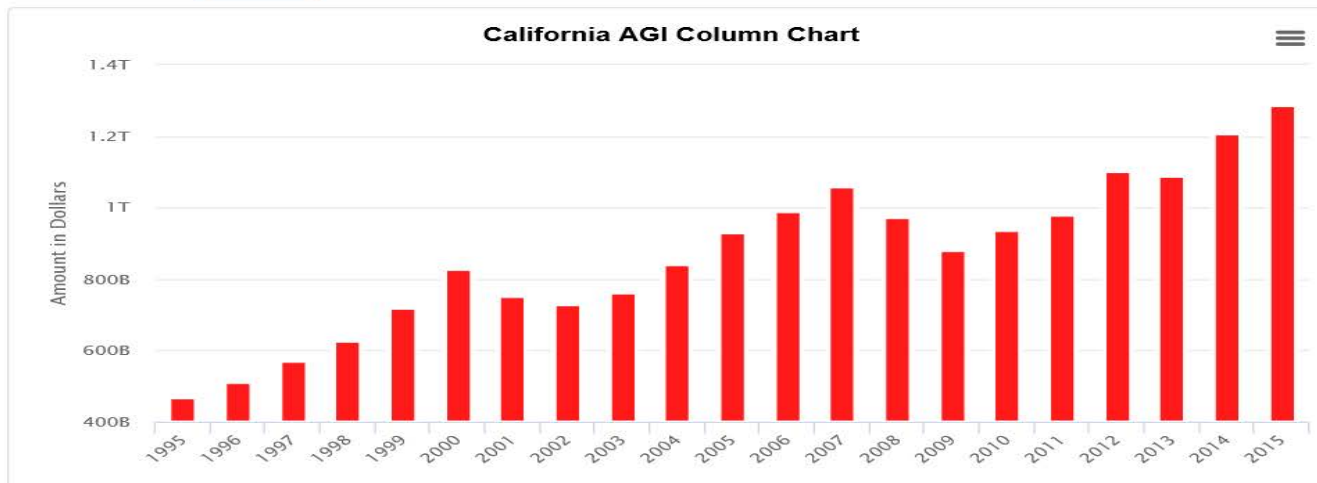
**Topic:**

**From:**

**To:**

**Chart:**

Go





# ODP ADVANCED OVERVIEW

Geared toward technical users (data scientists, developers, etc.)

- Allows greater manipulation (combining, etc) of available data
- Enables creation of more custom results

Open Data Portal - Advanced: <https://data.ftb.ca.gov/>


# ODP ADVANCED



Personal Income Tax



Corporation Tax



Other



Sample Personal Income Tax Graphs



Sample Corporation Tax Graphs



Other Samples



# STATS BY COUNTY

STATE OF CALIFORNIA Franchise Tax Board

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### B-6, Comparison By County

This dataset contains personal income tax statistics for taxpayers by the county of residence based on tax returns. Population data comes from the Department of Finance Exhibit.

Find in this Dataset

Manage More Views **Filter** Visualize Export Discuss Embed About

ID	↑	Taxable Year	Year Time Date	County	Population	All Returns	AGI	Median Income	Median Rank	Joint Returns
1		2015	2015	Alameda	1,619,679	744,071	69,738,790,000	50,031	7	282,559
2		2015	2015	Alpine	1,157	318	21,048,000	40,869	13	145
3		2015	2015	Amador	37,314	15,391	895,436,000	39,090	20	7,427
4		2015	2015	Butte	224,363	85,171	4,598,689,000	32,261	40	33,587
5		2015	2015	Calaveras	44,899	18,312	1,081,947,000	38,936	22	8,899
6		2015	2015	Colusa	22,271	9,229	601,212,000	33,799	32	4,009
7		2015	2015	Contra Costa	1,116,882	478,539	47,962,637,000	50,667	5	194,140
8		2015	2015	Del Norte	27,119	8,433	387,575,000	31,817	44	3,528
9		2015	2015	El Dorado	183,140	75,429	6,552,662,000	48,826	8	36,867
10		2015	2015	Fresno	979,357	352,556	18,743,128,000	29,843	53	126,495
11		2015	2015	Glenn	28,960	11,209	578,185,000	31,968	43	4,862
12		2015	2015	Humboldt	135,090	50,801	2,537,063,000	31,546	46	18,310
13		2015	2015	Imperial	185,328	62,952	2,665,126,000	24,921	58	25,810

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Showing Rows 1-50 out of 1,281

Home Terms of use Contact Us

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# VISUALIZATION PROCESS

The screenshot shows a web interface for a dataset titled "B-6, Comparison By County". At the top left, the URL "data.ftb.ca.gov" and a "Create" dropdown are visible. The top right contains notification, settings, search, and user profile icons. The dataset title is accompanied by a lock icon and a "View Data" button, along with "Visualize", "Export", "API", and a menu icon. An "Updated" date of "October 4, 2018" is shown with a bookmark icon. Below this is a section for "Featured Content Using this Data" with a "Manage Featured Content" button. The "About this Dataset" section includes "Create Alert" and "Watch this Dataset" buttons. The main content area is divided into two columns: the left column shows update dates (October 4, 2018) and statistics (5 Views, 0 Downloads); the right column shows "Topics" with "Category" and "Tags" both indicating no data.

data.ftb.ca.gov Create

B-6, Comparison By County View Data Visualize Export API

Updated October 4, 2018

Featured Content Using this Data

Choose to promote up to 3 Socrata assets that use this data, or choose to feature any relevant external resources. If left blank this section will be invisible. Manage Featured Content

About this Dataset Create Alert Watch this Dataset

Updated  
**October 4, 2018**

Data Last Updated October 4, 2018 Metadata Last Updated October 4, 2018

Date Created  
October 4, 2018

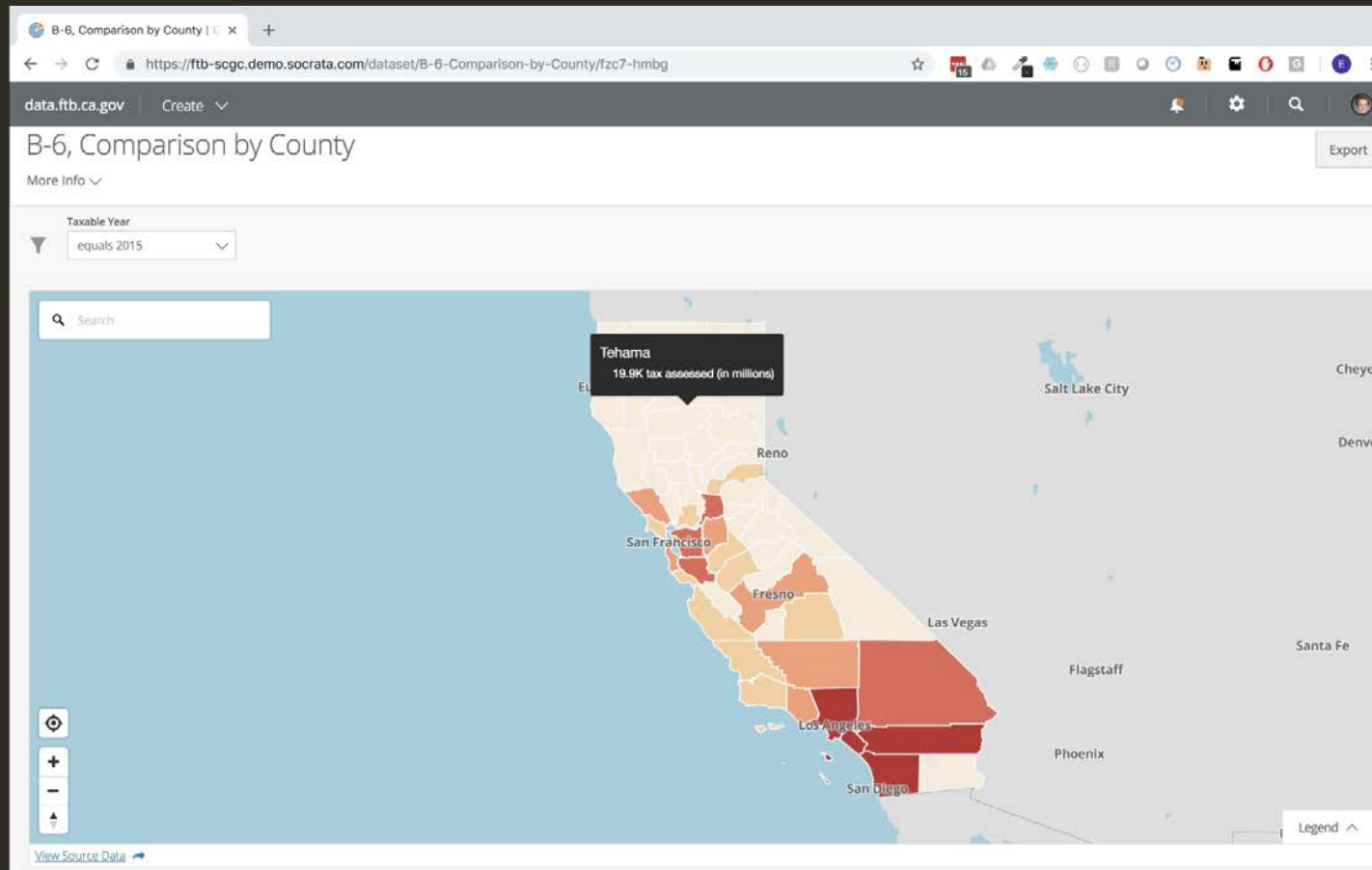
Views Downloads  
**5 0**

View all statistics for this Dataset

Topics

Category	This dataset has not been categorized
Tags	This dataset does not have any tags

# STATS BY COUNTY - VISUALIZATION



# STATS BY ZIP CODE

The screenshot shows the State of California Franchise Tax Board website. The main heading is "2014 PIT Stats by Zip Code". Below the heading is a table with columns: Taxable Year, Year Time Date, Zip Code, State, City, County, Returns, and CA AG. The table lists data for zip codes 90001 through 90012 in Los Angeles, CA. A red arrow points to the "Visualize" button in the top navigation bar. A dropdown menu is open from the "Visualize" button, showing options: Calendar, Map, Chart, and a "Launch New Visualization" button. Below the "Launch New Visualization" button is the text "Or continue to classic chart creation".

STATE OF CALIFORNIA  
Franchise Tax Board

2014 PIT Stats by Zip Code  
Based on [Personal Income Tax Statistics By Zip Code](#)  
This dataset contains data from California resident tax returns filed with California adjusted gross income and self-assessed tax listed by zip code. This dataset contains data for taxable years 1993 to 2014. For more...

Taxable Year	Year Time Date	Zip Code	State	City	County	Returns	CA AG
2,014	2014	90001	CA	Los Angeles	Los Angeles		20,606
2,014	2014	90002	CA	Los Angeles	Los Angeles		18,092
2,014	2014	90003	CA	Los Angeles	Los Angeles		24,971
2,014	2014	90004	CA	Los Angeles	Los Angeles		27,294
2,014	2014	90005	CA	Los Angeles	Los Angeles		15,328
2,014	2014	90006	CA	Los Angeles	Los Angeles		22,597
2,014	2014	90007	CA	Los Angeles	Los Angeles		12,325
2,014	2014	90008	CA	Los Angeles	Los Angeles		13,888
2,014	2014	90009	CA	Los Angeles	Los Angeles		1,100
2,014	2014	90010	CA	Los Angeles	Los Angeles		2,285
2,014	2014	90011	CA	Los Angeles	Los Angeles		35,259
2,014	2014	90012	CA	Los Angeles	Los Angeles		10,384

Showing Rows 1-50 out of 2,366

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# VISUALIZATION PROCESS

The screenshot shows a web interface for a dataset titled "Personal Income Tax Statistics by Zip Code". The interface includes a header with the URL "data.ftb.ca.gov" and a "Create" dropdown menu. The dataset title is accompanied by a lock icon and a "Code" label. Action buttons for "View Data", "Visualize", "Export", "API", and a menu icon are present. The "Updated" date is "October 4, 2018".

**Featured Content Using this Data**

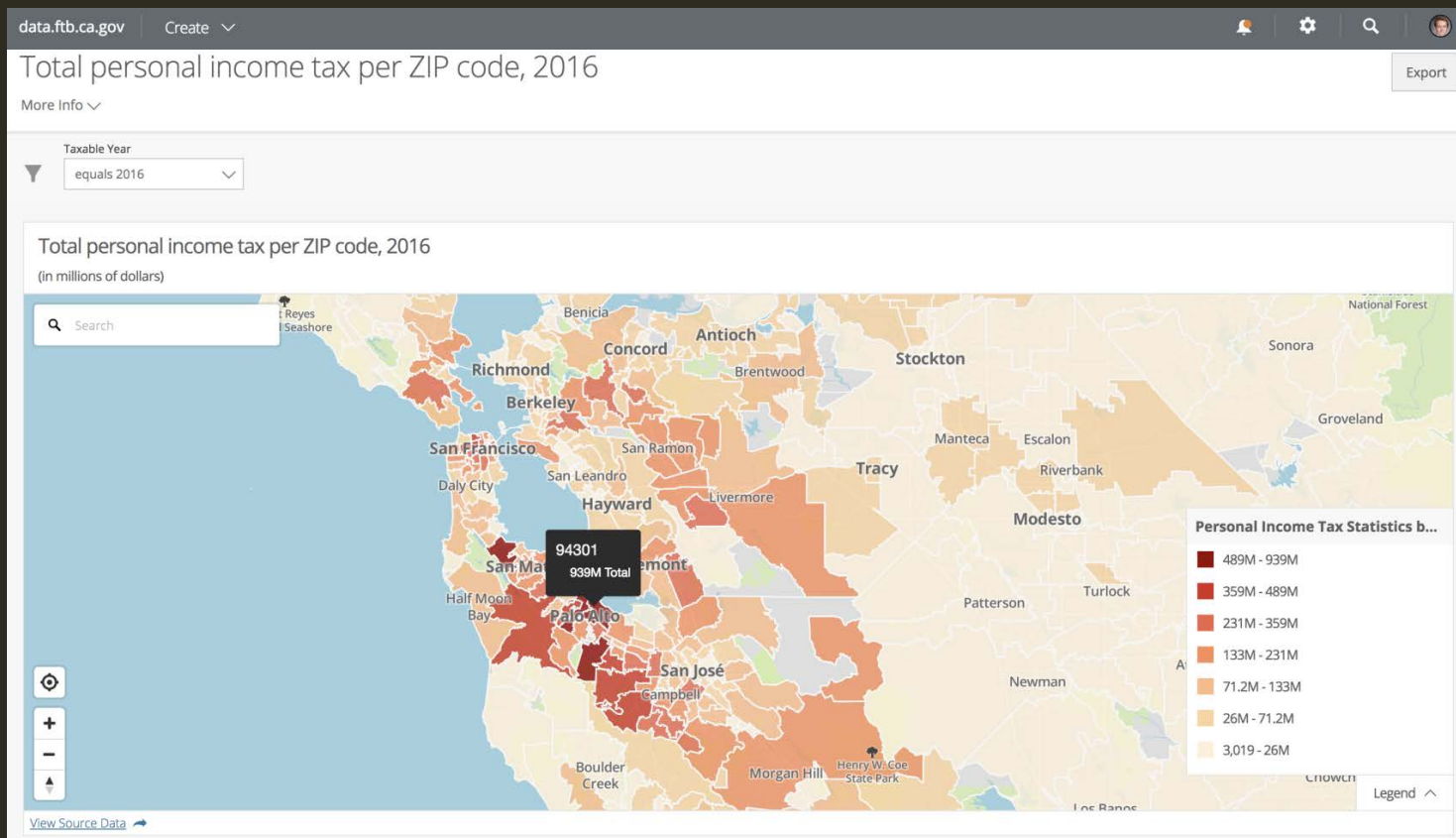
Choose to promote up to 3 Socrata assets that use this data, or choose to feature any relevant external resources. If left blank this section will be invisible. [Manage Featured Content](#)

**About this Dataset** [Create Alert](#) [Watch this Dataset](#)

Updated <b>October 4, 2018</b>		<b>Topics</b>	
Data Last Updated October 4, 2018	Metadata Last Updated October 4, 2018	Category	<i>This dataset has not been categorized</i>
Date Created October 4, 2018		Tags	<i>This dataset does not have any tags</i>
Views <b>7</b>	Downloads <b>0</b>		



# STATS BY ZIP CODE - VISUALIZATION



# USE CASE STUDY — LA TIMES ARTICLE



Los Angeles Times

The Next California | Part I: The Economy



## Can California's next governor fix the state's problems? It depends on Palo Alto

By MELANIE MASON

Graphics by ELLIS SIMANI and PRIYA KRISHNAKUMAR

SEPT. 23, 2018, 12:05 A.M.

(Cameron Cottrill / For the Times)

The "birthplace of Silicon Valley" sits in Palo Alto's 94301 ZIP Code

<http://www.latimes.com/projects/la-pol-ca-next-california-economy/>

# CASE STUDY

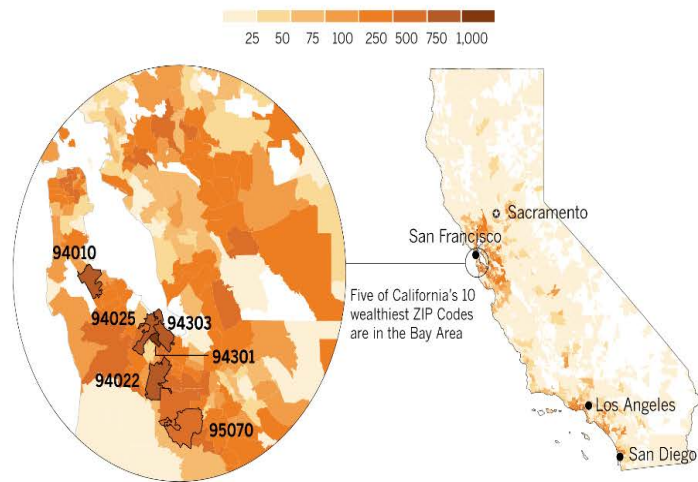
- Personal Income Tax Revenues drive the state budget and services provided to all areas of the state
- Very small areas (ZIP Codes) are responsible for vast majority of tax revenues and resulting services to all.
- Some counties highly dependent on what happens in these ZIP Codes
- Compare Tax Liability per ZIP Code to Tax Liability per County to draw comparison

# ARTICLE VISUALIZATION

we are very dependent on millionaires. If the millionaires get a cold, we all die of the flu.

— Mike Genest, former budget director for Gov. Arnold Schwarzenegger.

Total personal income tax per ZIP Code, 2016 (in millions of dollars)



Source: California Franchise Tax Board

The state scooped up just under \$1 billion from nearly 9,000 tax returns

# OPEN DATA — BEST PRACTICES AND CHALLENGES

- ❑ Accessibility
- ❑ Visualizations
- ❑ Data Standardization/Consistency
- ❑ Data/Report Glossary
- ❑ Maintenance and Updates

# FUTURE OPPORTUNITIES

- ❑ Include Other Published Data
- ❑ Use to Supplement Annual Deliverables to Stakeholders
- ❑ Continue to Add Meaningful Data
- ❑ Increase Self-Service and Transparency
- ❑ Allow Data to Drive Increased Service to Citizens
- ❑ Bring Citizens Closer to Government

# QUESTIONS?

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