



# **NASCIO 2018 IT Recognition Awards Nomination**

## **California State Treasurer's Office**

**Title: California Business Incentives Gateway (CBIG)**

**Category: Business Process Innovations**

**State: California**

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**Project End Date: December 12, 2016**

## **CBIG EXECUTIVE SUMMARY**

California state and local governments offer hundreds of tax and economic development incentives intentionally designed to help grow and shape California's economy. Historically, businesses and individuals have had great difficulty finding those programs across hundreds of disparate government websites. Seeking to make government more customer-centric, the California State Treasurer envisioned an online marketplace where website visitors could easily find California's government incentives, personalized by a user's location and browsing patterns. In response, the State Treasurer's Office (STO) created the California Business Incentives Gateway (CBIG), a transformational solution to the way citizens and businesses discover and apply for economic incentives. CBIG brings tremendous efficiencies to the state's government operations by creating an online marketplace designed for customers, not government.

In private industry, Amazon has emerged as the de facto best-practices approach for an online marketplace. CBIG is uniquely comparable to Amazon's marketplace, in that finally government is designing services with the customer in mind, in a one-stop shopping platform for all of California's tax and economic incentives. CBIG website visitors find the exact economic development incentives that fit their objectives, regardless of which California government entity created them. These incentives may have been created by state agencies, cities, counties, special districts, joint powers authorities, or the federal government, but the consumer need not have expertise in the underlying government silos. They just need to "shop" for California's incentives on the CBIG marketplace.

The STO enlisted the assistance of SymSoft Solutions to facilitate STO's in-house team bringing the Treasurer's vision of a digital government marketplace to reality. SymSoft developed a taxonomy system to identify categories for personalization, including region, business operation, incentive type, and keywords. As visitors use and browse the CBIG website, in addition to retrieving results from faceted searches, Sitecore XP with Sitecore Experience Database (xDB), infers their preferences and surfaces relevant recommendations, based on browsing history.<sup>1</sup>

CBIG understands the value of regional incentives and enables users to find tax and economic benefits by ZIP code. Location-based personalization ensures that CBIG visitors find the right programs and details for their desired locale, relieving consumers of the burden to search a patchwork of government organizations to achieve geographic alignment with their business objectives.

In addition to presenting incentives, CBIG provides additional content, such as how to qualify for the incentives, how and when to apply, and contact information for the government entity sponsoring the incentive. CBIG's content management system is a secure, user-friendly interface enabling virtually limitless content contributions from California's government entities ensuring the site remains dynamic and relevant by easily adding, managing, and publishing incentives on CBIG.

Today, CBIG is California's only online marketplace serving up economic incentives from hundreds of distinct California agencies, saving time, money, and resources, while helping businesses thrive across the state. CBIG is making it easy for citizens and businesses to connect with California's diversity of incentives such as tax credits, fee waivers, one-stop permitting, training grants, loan guarantees, and more, all in one online market-place.

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<sup>1</sup> Adapted from Sitecore Case Study // California State Treasurer's Office, CBIG, March 30, 2018

## **CBIG CONCEPT**

The State of California and more than 4,000 local California governments have created literally hundreds of programs and incentives that are designed to help grow the Golden State's economy. These incentives include site selection services, targeted tax breaks, training grants, fee waivers, permit assistance, low-cost or tax exempt financing, reduced utility rates, and employee recruitment, to name just a few. But, these incentives are only effective at creating jobs if they are used, and they are only utilized as intended if businesses know that the programs exist, match their needs and are accessible.

Even with California's global technology leadership, the state lacked a consolidated, consumer-friendly website that could guide business decision-makers through an interactive experience allowing them to identify all government-sponsored, business-expansion programs and incentives in California. Thus, the State Treasurer conceived the idea of building an online marketplace that could connect all of California's government incentives with users, tailored to business specific interests. This online marketplace would, for example, make it easy for a business contemplating expansion to avoid a laborious and frustrating exercise of visiting perhaps hundreds of state and local websites to find some threads of relevant information. Mitigating the hunt and peck method with a comprehensive incentives marketplace would foster confidence and certainty, knowing users had found the best California had to offer.

The Treasurer asserted the time had come for California to apply its technology acumen to solve this problem. In preliminary discussions, the STO evaluated whether the information STO would collect could be too disparate, community specific, and lacking comparability or consistency. However, one can simply look at the success of the Amazon marketplace and the diversity of its content, to recognize that a California government incentives marketplace can be just as effective. As the Amazon shopper deftly sifts through millions of products and quickly achieves the desired search results, the Treasurer's concept was that anyone seeking government economic incentives would have a similar experience on a website that surfaces tailored content from an exhaustive, and fluid repository.

The concept for the California Business Incentives Gateway (CBIG) emerged. It was to deliver an efficient, friendly, and familiar navigation experience, in a one-stop shopping platform for all of California's tax and economic incentives. The CBIG marketplace would allow any website visitor to find the exact economic development incentives that fit their objectives, regardless of whether it was offered by state agencies, cities, counties, special districts, joint powers authorities, or the federal government. CBIG would assist users determining eligibility, how to apply, and where to direct inquiries, all in the same website. CBIG would eliminate hours of potential frustration navigating hundreds of government websites, on a quest to find California's government economic and business incentives, but never knowing if that was fully achieved.

### **CBIG's Solution Architecture**

The Treasurer had confidence in his vision for an online government incentives marketplace coming to fruition, as the STO's CBIG technology team had significant maturity and experience working together under his leadership. Previously, the team had taken transformational ideas and moved them to reality with transparency websites and interactive online applications. As a result, the CBIG team brought tried and true best practices to the forefront of the project. Although the STO team had prior experience working together on technology initiatives, CBIG is not part of a larger project. The CBIG project is a standalone initiative.

A traditional project management approach was taken, clearly defining the project governance, planned resources, roles, responsibilities, funding, schedule, constraints, and stakeholders. The project was essentially a waterfall development, incorporating agile attributes post-prototype delivery. CBIG's project staffing

required approval from the California legislature, who closely monitored the project's progress. Careful application of California's project management methodology contributed to the success of the CBIG project.

The STO's technical team solicited and awarded a contract to SymSoft Solutions. SymSoft introduced Sitecore XP with Sitecore Experience Database (xDB), to the CBIG application design. This functionality would create a personalized digital experience serving content to visitors based on their location and browsing patterns. Employing a taxonomy system, the CBIG application would personalize content by region, business operation, incentive type, and keywords. Visitors would execute faceted searches on the CBIG website, and CBIG would infer their preferences, surfacing relevant content recommendations. This functionality is analogous to online shopping websites, where a user is shown additional products that were of interest to others searching the same content.

SymSoft's design supported the CBIG vision of enabling users to input a ZIP code to see all incentives offered in a specific region. Location-based personalization would ensure CBIG visitors could find government incentives intended for developing business opportunities in a precise geographic area. This functionality met the Treasurer's objective of relieving consumers of the burden to research myriad government organizations in a quest to find any incentives that uniquely aligned with their business objectives.

The project management model depended heavily on engaging stakeholders well beyond the boundaries of the Treasurer's Office. As the CBIG team focused on requirements, which were thoroughly vetted with the principal stakeholder, John Chiang, the small business and manufacturing communities were engaged for creative input, and requirements' validation, and they remained valued partners through every phase of the project's lifecycle. Additionally, STO solicited input from California's state agencies, and local governments throughout the state. They too, served as honorary project advisors from requirements definition through prototype evaluation and user acceptance testing. When the system was released to production, these state agencies and local government partners enlisted as part of CBIG's promotional awareness and adoption campaign, encouraging content contributions from their peer agencies and departments. The concept was quite literally, "If we build it, they will come!"

The CBIG project was projected to cost just under \$1,000,000 and be completed within twelve months. Happily, that was successfully achieved. Three staff supported the project on a less than fulltime basis, for a total of 2,127 hours from the beginning of the project 1/15/2016, to its conclusion, 12/12/2016, at an approximate staff cost of \$105,500.<sup>2</sup> The SymSoft contract totaled \$424,850. Two years of software and hardware licensing cost \$189,957. The total project cost was \$720,307. At the conclusion of the CBIG project, we were happy to inform the legislators that the project was successful, delivered on schedule and within budget!

The extent to which incentives are published on CBIG, is the first measure of success for the online marketplace. Upon go-live, and continuously since, CBIG statistics are collected and reported on a weekly basis to assess adoption by California's government entities. Among the data points are page views by days, and weeks, originating from go-live. In addition, the report reflects the number of registered government entities (currently 135), the number of published incentives (currently 355), and the names of the California state agencies cities, counties, federal agencies and special districts offering incentives on CBIG. Other anecdotal evidence has been bountiful in meetings with business constituents who stated publicly and online the site is a wonderful idea, overdue, and well-designed.

CBIG was built with advanced features to address responsiveness, accessibility and website integrity. The CBIG application is a fully responsive website, enabling users to view and interact with content on fixed and mobile

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<sup>2</sup> Personnel costs are approximated and rounded up.

devices, alike. In addition, the website was designed to meet stringent ADA Section 508 accessibility guidelines, achieving compliance with accessibility standards such as California's Web Content Accessibility Guidelines. CBIG's data is all public data, open to the public and does not contain sensitive or personally identifiable data. Website integrity is achieved through a multilayered approach including firewalls, packet inspection, content filtering, identity and access management inherent in the Amazon Web Services (AWS) infrastructure, enterprise antivirus software in AWS, and STO's website monitoring tools.

STO maintains ongoing oversight and responsibility for the CBIG platform. Government entities register on CBIG, and manage their own content. STO validates the registration meets the definitions for CBIG publishing. Namely, the submitting entity is either a state agency, city, county, special district, Joint Powers Authority, or federal agency providing economic incentives within the state of California. STO vets the initial representative from each registered agency; but subsequently, that representative is responsible for vetting any additional content contributors from within its respective agency. STO is responsible for reviewing and ensuring all submitted content conforms to CBIG's design standards and contains only acceptable content, per published terms. STO is responsible for operational support of the CBIG web application and the component hardware and software upon which CBIG operates. The STO may receive emails submitted through CBIG's "Contact Us" email link, and responds accordingly.

For both education and outreach, STO developed a tiered communication plan consisting of press releases, interactive product demonstrations, and printed materials. The press release is traditionally the STO's first communication vehicle for announcements of consequence. CBIG launch presentations were held throughout the state, and in diverse venues, from government to industry. These interactive presentations consisted of executing a communication plan that allowed the Treasurer to extol his vision, supported by a cast of STO staff demonstrating CBIG functionality. Additionally, business partner testimonials have been included in the presentations, as well as dynamic question and answer sessions with the audience. As expected, CBIG has seen an increase in website hits and registrations following these events. The CBIG website hosts tutorials for new users, and marketing brochures are available in print and online, containing all relevant CBIG information.

## CBIG'S SIGNIFICANCE

CBIG's significance cannot be overstated. It is transformational for government and constituents by delivering a citizen and business-centric, online marketplace designed to effortlessly connect constituents with laser-like precision to their desired government incentives, from amongst a potential universe of thousands of incentives. CBIG dramatically changes the economic development landscape in California by simply putting the opportunities state and local governments have worked so hard to create and maintain, in the hands of California's innovators, entrepreneurs and job creators.

Every California government sponsored tax and economic incentive is the defined scope of CBIG. CBIG's direct beneficiaries and stakeholders are all California businesses or potential California businesses. CBIG's indirect beneficiaries are the communities that thrive in a flourishing economic environment, with job creation and business expansion. While small businesses in manufacturing, trade and service sectors are likely ideal consumers, CBIG is universally welcoming and does not necessitate user credentials to browse incentive details. Any business or constituent can freely evaluate all incentives offered.

CBIG is the most innovative and distinct government incentive site currently in existence, although there are some similarities with the California Governor's Office of Business and Economic Development website (a.k.a. "Go-Biz"). Go-Biz is a portal intended to provide connection points to a full array of government services from within a limited span of California state agencies. Although Go-Biz hosts some economic development incentives, Go-Biz gives entrepreneurs a starting place for a new business, helping identify the business license

process, providing information to establish a business name and assistance determining when taxes are due, among other things.

Go-Biz staff manage all of the content on their site. Thus, with limited resources, dynamically maintaining and/or retiring all relevant content can be particularly challenging. Here, CBIG differentiates itself from Go-Biz by using an innovative approach providing government entities with the credentials to be self-sufficient authors, in complete control of their content to add, change and delete as incentives are created, adjusted or retired. This enhances the beneficiaries' experience, by ensuring incentives are accurate and up to date. Aside from their differences, Go-Biz is registered on CBIG, and adds their incentives to the CBIG marketplace.

Although the project formally ended with CBIG's go-live in December 2016, it was followed by an active promotional awareness campaign throughout 2017, with many roadshows. The benchmark was to have 20% of all estimated providers of government incentives throughout California, registered and published by July 2017. The target was met and exceeded, coming in at 22.41% of the potential, estimated universe, and continues to grow. This is important because just as the Amazon marketplace derives its value from the vast quantity and diversity of products offered for sale, so CBIG becomes the go-to place for one-stop shopping for all of California's economic growth incentives, for mom-and-pop businesses to multinational corporations.

CBIG brings positive change to California, offering a digital marketplace to connect business owners and entrepreneurs with economic opportunities to make their California dreams come alive.<sup>3</sup> Under the overarching umbrella referred to as the "STO," the Treasurer chairs seventeen Boards, Commissions and Authorities (BCAs), each of which have always maintained their own communication efforts to spread the word on their various economic and tax incentive offerings. CBIG streamlines that communication effort, not just for the STO and BCAs, but for the more than 4,000 local governments. Incentives are surfaced to constituents within each respective geographic region. For these constituents, their formerly daunting incentives-pursuit was just transformed into a pleasant and meaningful, one-stop-shop, online marketplace.

State Treasurer, John Chiang, has consistently sponsored policies and directed resources to deliver online initiatives that demonstrably open communication channels and engagement between constituents and California government. With precision analysis, he knows what's working and what's not, then defines the plan for what a good solution looks like. Having previously delivered multiple accountability transparency websites, CBIG is but one more visionary solution designed with the customers in mind.

Furthermore, CBIG aligns with the Governor's stated objectives for improving economic development and job creation efforts within California, and aligns with the state's IT Strategic Plan, entitled "One Digital Government Securely Delivered by a Dynamic Workforce." CBIG aligns with STO's enterprise architecture, and STO's published plans for sustainable economic development. It meets state and federal mandates, including accessibility. CBIG is fundamentally aligned with NASCIO's mission, vision and guiding principles, in addition to the Top Ten Priorities, with the exception of # 7 – Broadband/Wireless Connectivity, as that is not applicable to CBIG.

## IMPACT

CBIG represents substantial and measurable change in the way it delivers a one-stop shopping experience for all of California's government sponsored economic incentives. This makes state government better and more efficient, eliminating the need for every state department to reinvent the wheel.

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<sup>3</sup> State Treasurer, John Chiang

Prior to CBIG, the economic incentives landscape was littered with multitudes of disparate communications where individual state agencies, cities, and counties spent thousands or even millions of dollars each year to promote their opportunities and incentives. They used websites, brochures, direct mail, trade shows, and ads in everything from in-flight magazines to bus stands. Not being able to quickly and easily access this critical information gave businesses the false impression that California is out of touch with their needs and is not working to create a hospitable business climate.

CBIG dramatically changes today's economic development landscape in California by simply putting the opportunities state and local governments have worked so hard to create and maintain, in the hands of California's innovators, entrepreneurs and job creators. There is not a more efficient and effective economic development strategy that communicates "California is Open for Business." CBIG is a significant shift away from the standing practice of searching for incentives amongst California's government silos. The esoteric understanding of California's statutory authorities, combined with the patience necessary to comb through hundreds, possibly thousands of websites is a burden of the past, owing to CBIG's customer-centric design.

The immediate financial reasons that make this project worthy of the investment is the cost avoidance 135 departments and agencies enjoy, by knowing they no longer need to create their own mechanisms to find their target audiences. The non-financial reasons that make this project worthy of the investment are most eloquently described by the Little Hoover Commission (LHC) in a letter to the Governor and Legislature, October 22, 2015, decrying the state's unwieldy and cumbersome technology siloes, LHC president Pedro Nava wrote, "... Why can't an aspiring business owner go to one website and fill out one form and open up shop? ... The Commission found technology is an important part of the solution. But it isn't everything. It starts first with a customer-centric focus and a willingness to question the way things usually get done." CBIG was designed and deployed with this simple objective, a one-stop shop.

The immediate impact of the initiative is that 355 incentives are currently published on the site, and 84 state and local governments no longer have to advertise their incentives, attempting to reach target audiences. Online journals, publications and social media are spreading the word about CBIG, and drawing more visitors daily. An average of 855 people use CBIG every week. Awareness and outreach campaigns are drawing more agencies and departments onto the platform. The longer term impact, is that like the Amazon market place, the more registered products, the greater the exponential benefit. It is quite literally the fulfillment of the economic development strategy that "if we build it, they will come!"

STO and the Treasurer's respective seventeen BCAs (supported exclusively by STO's technology team) nominate CBIG for this award because the benefits are quantitative, reducing overhead administration and maintenance of each of the respective website's incentives pages, as was previously performed. Now, this one resource can be directed to other critical supporting workloads, rather than redundantly addressing the same workload in eighteen different flavors. In addition, each respective program benefits from broad constituent exposure achieved through CBIG's online marketplace. Constituents now have a single website that's user friendly, and comprehensive. No more hunting and pecking through a maze of California government entities, saving personal time and stress. The transformational customer-centric design of CBIG is the proverbial icing on the cake for constituents, in that CBIG goes beyond the boundaries of the STO, providing a platform to embrace all California incentives.

The Treasurer recently stated that prior to CBIG's deployment, "millions of dollars of incentives were left on the table every year," but now "we have over one billion dollars in incentives on CBIG."<sup>4</sup> The online gateway is connecting business owners and entrepreneurs to incentives, including tax credits, loans and bond financing, helping grow and create jobs. CBIG contributes to a thriving economy that benefits everyone in California.

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<sup>4</sup> State Treasurer, John Chiang, CBIG Launch, San Diego, March 28, 2018.