Summary of Sampling and Estimating for Annual Reporting

Starting in 2026, FCSS programs can use sampling and estimation for easier tracking throughout the year. There are several resources available to help you decide if these methods will work for you and, if so, how to use them.

There are two places that sampling is appropriate in annual reporting, each with its own guidance:

1. **Sampling referral interactions**
   a. <u>A Referral Sampling Manual</u>: Offers contextual information and a flow chart to help you decide if this is the best method along with detailed instructions on how to use the tools, many examples and FAQs.
   b. <u>A Referral Sampling Tool:</u> Contains several tools to:
      i. Identify the number of days to sample
      ii. Identify an approach to when to sample those days
      iii. Track referrals made on those days
      iv. Check your sampling approach at a midway point
      v. Generate an annual report count
   c. <u>A series of how-to videos:</u> These videos provide:
      i. An overview of the Referral Sampling Tool
      ii. Demonstration of how to use each tab (or tool) within the workbook.
2. **Sampling participation in drop-in programs**. A separate manual, tool and how-to videos are available to show how to sample for drop-in program participation. The process and logic are exactly the same as sampling referral interactions, but the language and examples have been edited for drop-in programs.

There is one instance where estimation is appropriate in annual reporting:

1. **Estimating participation in registered programs.** Guidance and instructions are included in the manual for how to sample for drop-in programs.

You are encouraged to familiarize yourself with the manual(s), tools and videos to help you decide if sampling is right for you.

You should make this decision at the start of each calendar year, so that you can set up the year to sample appropriately and to know whether you need to track referral or participation interactions.

<u>These tools are optional;</u> they are intended to make counting and reporting easier for you. If you have a unique situation that does not seem to fit in with the provided guidance, sampling may not work for you. If you find the sampling approach is overly complex or if you offer few days per year of referrals or drop-in programs, sampling may not offer much of a timing saving. You are free to return to whatever methods you have used in the past to track these metrics.

Summary of Sampling Process

Sampling involves choosing a sample size of days throughout the year to track. You must know approximately how many days in the year you offer your referral service or drop-in program.

The average count per sampled day is multiplied by total service days to estimate an annual count that can be reported.

• **Step 1: Choose Sample Size:** Estimate the number of service days per year. Consider whether referral volumes or participation rates vary significantly by day, week, or season. The tool provides suggested sample sizes and strategies accordingly.

• **Step 2: Select Sampling Days:** For services that don't vary, use an online random date generator or Excel formula to select days. For services that do vary, divide days into groups (e.g., exceptional times vs. typical times) and sample proportionally from each.

• **Step 3: Populate Tracker and Set Reminders:** Enter selected dates into the Tracker tool or use an alternative tracking method. Calendar reminders are suggested to ensure tracking on sampled days.

• **Step 4: Track Referral Interactions:** On selected days, count referral or participant interactions using any preferred method. Enter daily totals into the Tracker. If a day is missed, leave it blank; enter zero if no interactions occurred.

• **Step 5: Check Sampling Strategy:** Optionally, midway through the sampling period, review your generated average, range, and median counts to assess accuracy. If this information differs significantly from expectations, consider increasing your sample size.

• **Step 6: Calculate Annual Report Number:** Use the average counts per sampled day multiplied by the total service days to estimate the annual referral count.

Summary of Estimation Process

For registered programs, estimating the number of participant interactions is an available option.

- **Step 1:** Sum the total registered participants over the year and multiply by the number of sessions.
- **Step 2:** Apply an adjustment factor to account for some missed days.