



AI and I&R/A

Governance and Guidance

September 2026

ABOUT THE SURVEY

AI tools are rapidly emerging in software, systems, and platforms. These tools may assist with administrative tasks, resource database management, quality assurance, transcription, analytics, and/or direct consumer interactions (e.g., chatbots or automated referrals).

To better understand AI use across Information & Referral/Assistance (I&R/A) programs, including those that may also be described as Community Navigation, ADvancing States conducted a survey in April of 2026. The survey gathered data on how I&R/A programs are currently using, or considering, AI tools, and what policies and practices are in place.

This infographic covers governance, policies and procedures, training, and field support needs.



Respondents

Out of 128 respondents, 29 percent were Area Agencies on Aging (AAAs), 20 percent were Centers for Independent Living (CILs), 15 percent were State Agencies on Aging and/or Disability, 13 percent were Aging and Disability Resource Centers (ADRCs), nine percent were other non-profit organizations, an additional nine percent were 21Is, and five percent were "other".



Program Size

The majority of respondents represent small to modest-sized I&R/A programs. 65 percent of respondents reported they have between one and 10 staff on their I&R/A program. Just 18 percent of respondents said they have over 20 I&R/A staff.

Governance of AI Tools

Formal Plans and Strategies

28%

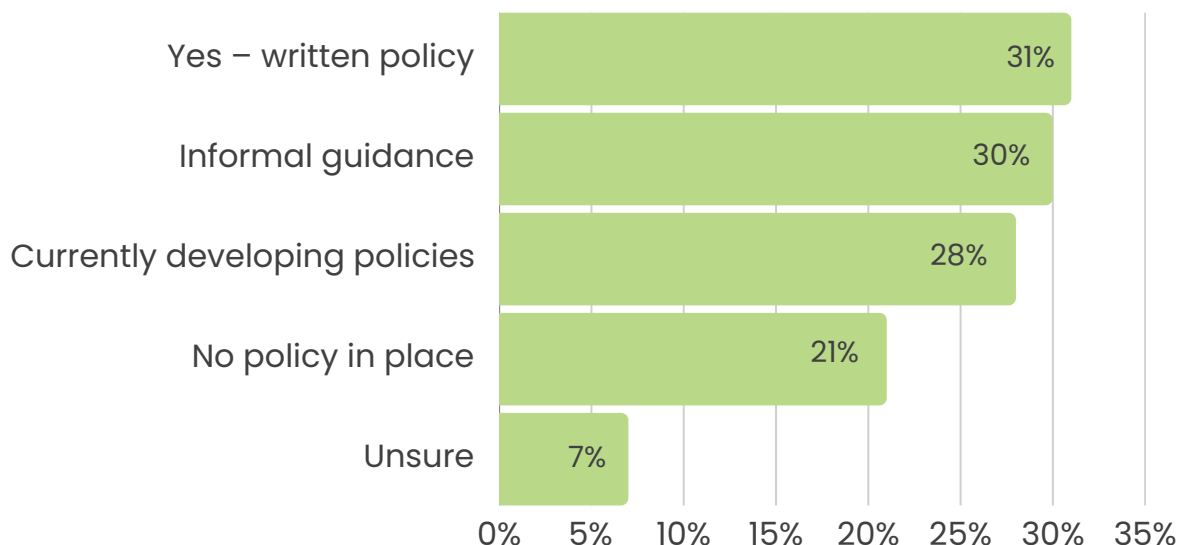
*of respondents using, piloting, or exploring AI tools **operate under a formal plan or strategy** related to the use of AI (n=60). 42% have no formal plan and 30% were unsure.*

Of the 28% who have a plan,
77% said the strategy exists mostly at the **organization/agency level** (n=17).

Policies and Procedures

Respondents using, piloting, or exploring AI tools reported on the status of policies or procedures in place regarding AI use within their organizations (n=61). Respondents could select all that apply. While 31% of respondents have a written policy and 30% are operating under informal guidance, another 28% are still in the process of developing policies. The awareness of the need for governance is growing, but formal structures have not yet caught up with the pace of AI adoption.

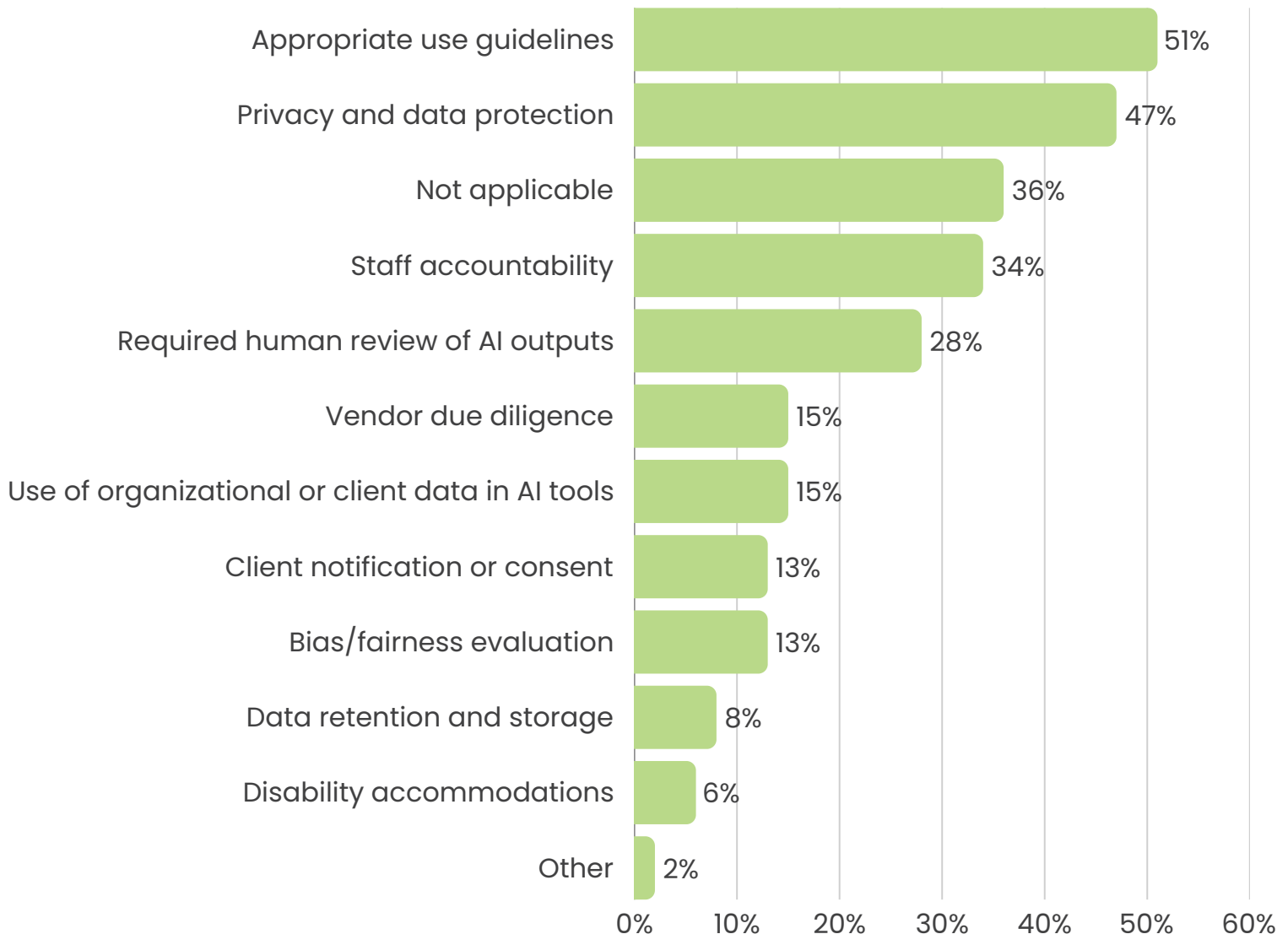
Status of Policies and Procedures for AI Use



Policy Topics

Respondents using, piloting, or exploring AI tools identified the topics their policies and procedures address (n=53). While privacy and confidentiality was reported as a top concern across the field, just 15% have translated that concern into formal policy on how client or organizational data may be used within AI tools. Where human oversight exists, survey respondents report this involving the review of call summaries and transcripts and checking the accuracy of taxonomy selections.

Topics Addressed in AI Policies or Guidance



Training and Support

Status of Training on AI Tools

Informal learning dominates. **When staff learn on their own, critical areas like data protection, client privacy, and organizational policy could be missed.**

Structured training can help staff use AI more effectively, preserving the critical thinking that I&R/A work demands. Among organizations currently using or piloting AI tools (n=34):

44%

Informal learning only

Staff are learning on their own, through experimentation and peer sharing

24%

Formal training provided

Organization offers structured training on AI tools and their use

18%

No training provided

No training in place; staff using AI tools without formal support

12%

Other

Including vendor-provided training and organizations just beginning

Field Support Needs

All survey respondents were asked to report what would be most helpful to their organization regarding AI use (n=115). The following are the top three reported field support needs:

70%

Want Training for Staff

80 of 115 respondents said staff training is the most helpful support.

68%

Want Sample Policies & Templates

Organizations want practical, ready-to-use governance tools they can adapt.

62%

Want Peer Learning Opportunities

The field wants to learn from one another.