



AI and I&R/A

The Spectrum of AI Tools

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 the most common sources of AI tools, systems where AI is used, and how independently adopted AI tools are governed.



Respondents

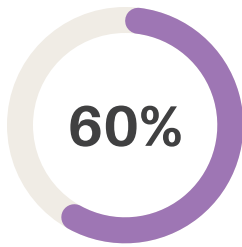
Out of 128 respondents, 29 percent were Area Agencies on Aging (AAAs), 20 percent were Centers for Independent Living (CILs), 15 percent were State Agencies on Aging and/or Disability, 13 percent were Aging and Disability Resource Centers (ADRCs), nine percent were other non-profit organizations, an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



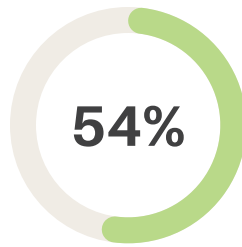
Program Size

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.

Source of AI Tools



**Independently
Adopted AI
Tools**



**Embedded in
Vendor
Platforms**

For agencies using and piloting AI tools, the most commonly reported sources were independently adopted tools (e.g. ChatGPT, Claude, etc.) and those embedded within existing vendor platforms (n=35). Other less commonly reported sources include tools developed with a vendor (20%); custom-built tools developed internally (11%); and tools embedded in reporting or analytics software (6%).

AI Tools Embedded in Vendor Platforms



Common vendor platforms with embedded AI

NICE inContact and LinkLive were commonly reported as vendor platforms with embedded AI by respondents using or piloting embedded tools.



Communication & call-management platforms

Microsoft products (Teams, Outlook, Copilot, Dynamics) and telephony/communication platforms (RingCentral, Zoom, Genesys) are also used, reflecting a pattern of AI being adopted through existing communication and call management infrastructure.



Community Navigation sector platforms

Only a handful of survey responses mentioned platforms purpose-built for the Community Navigation sector, such as iCarol and Visionlink.

Governance of Independently Adopted AI Tools

Survey responses point to the growing use of independently adopted AI tools, like ChatGPT and Claude. Organizations using, piloting, or exploring AI (n=58) reported how that use is governed. The most widespread protection is prohibiting entry of client data, cited by 40% of respondents.

Informal and ungoverned use is common – together, **55%** of respondents report that independent AI tool use occurs informally or is permitted without formal governance.

GOVERNANCE APPROACH

40% Client information restricted

33% Informal use

22% Permitted, not governed

19% Leadership direction

9% Role restricted

9% Not allowed

What this means

Staff are prohibited from entering client-identifiable information into independent AI tools

No formal governance in place

Not formally governed

Clear direction from leadership

Limited to certain staff roles

Organization does not allow independently adopted AI tools

OPPORTUNITIES AND CONSIDERATIONS

Independently adopted AI tools can help staff with everyday tasks like communications as well as with creative work. But informal use, without clear guidance (e.g., shadow AI), raises questions about data privacy and consistency. Building clear guidance can help organizations capture the benefits while managing the risks.