

USAging



ALLEGHENY COUNTY



Connecting You to Community Services



Artificial Intelligence: Opportunities and Challenges for Information and Referral Programs

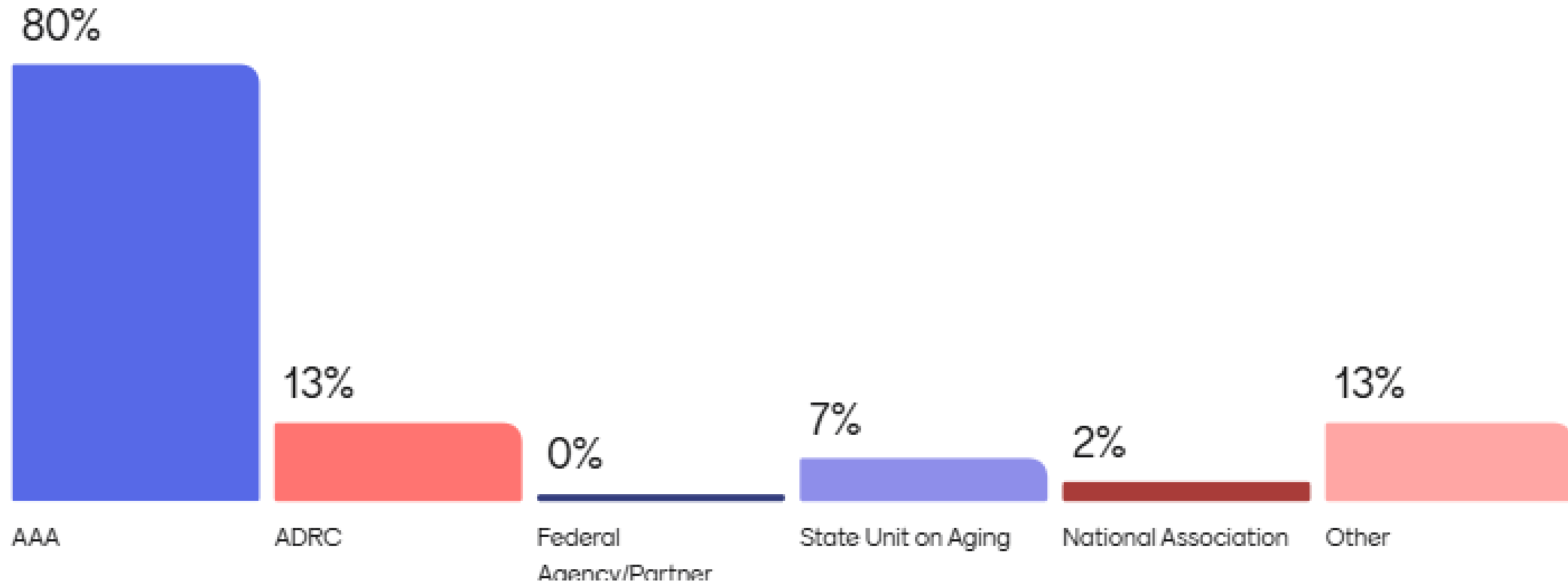
**Information & Referral
Pre-Conference Intensive**

July 18, 2026



Welcome!

What type of organization do you represent?



Presenters

- **Sara Tribe Clark**, USAging, Director, Eldercare Locator
- **John Gonzales**, USAging, Program Manager, Eldercare Locator
- **Alice Kelsey**, ACL, Deputy Director, Administration on Aging
- **Dr. Shannah Tharp-Gilliam**, AAA Administrator, Allegheny County Dept of Human Services
- **Nanette Relave**, ADvancing States, Senior Director, National I&R Support Center



Today's Topics and Activities

- Why are we talking about this?
- Current context for AI in I&R work
- Review key AI tools applicable to our work
- Practice techniques for constructing prompts
- Discuss key topics with your peers
- Take home useful ideas for next steps in your AI journey

Administration on Community Living

Alice Kelsey, Deputy Director, Administration on Aging (AoA)



Leadership, innovation, collaboration
for state Aging and Disability agencies

AI Use in I&R/A Programs: Findings from a National Survey

USAgging Conference 2026

ADVANCING STATES



Leadership, innovation,
collaboration for state
Aging and Disability agencies.



ADVANCING STATES



Our mission is to design, improve,
and sustain state systems
delivering long-term services and
supports for older adults, people
with disabilities, and their
caregivers.





NATIONAL INFORMATION & REFERRAL SUPPORT CENTER



Services

- Technical Assistance and Training Webinars
- Training: Online training; Inform USA certification training; and Train the Trainer
- Distribution lists: sharing information and resources advancingstates.org/community-opportunities/stay-informed
- National surveys: Aging and Disability I&R/A Networks
- National training events: HCBS and partner conferences



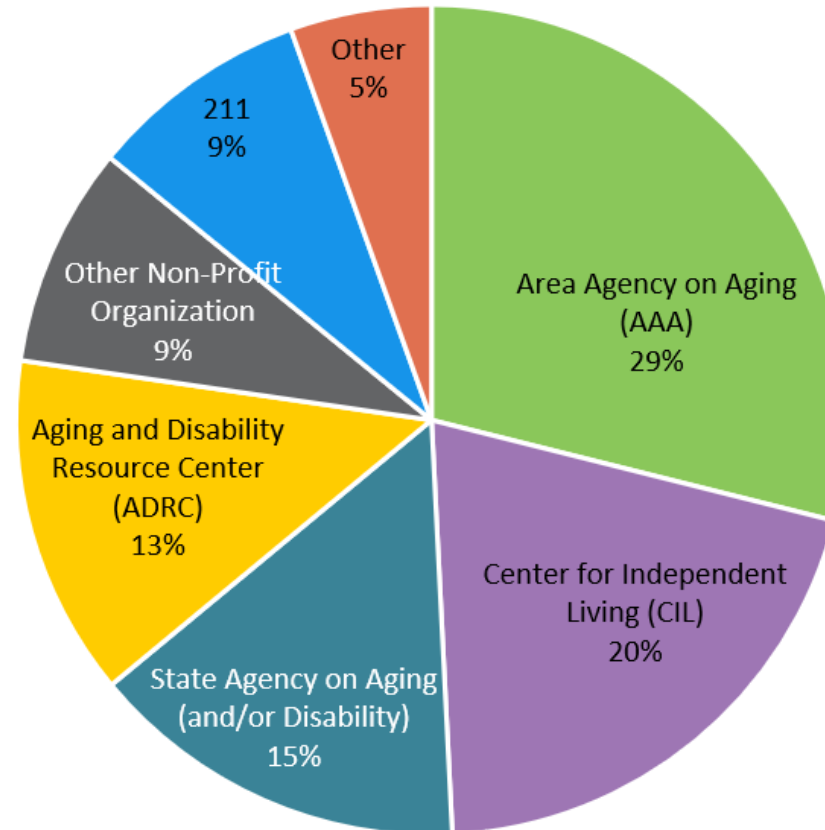
Goal

To build capacity and promote continuing development of aging and disability information and referral services nationwide.

Understanding the Evolving Landscape of AI Use in I&R/A Programs

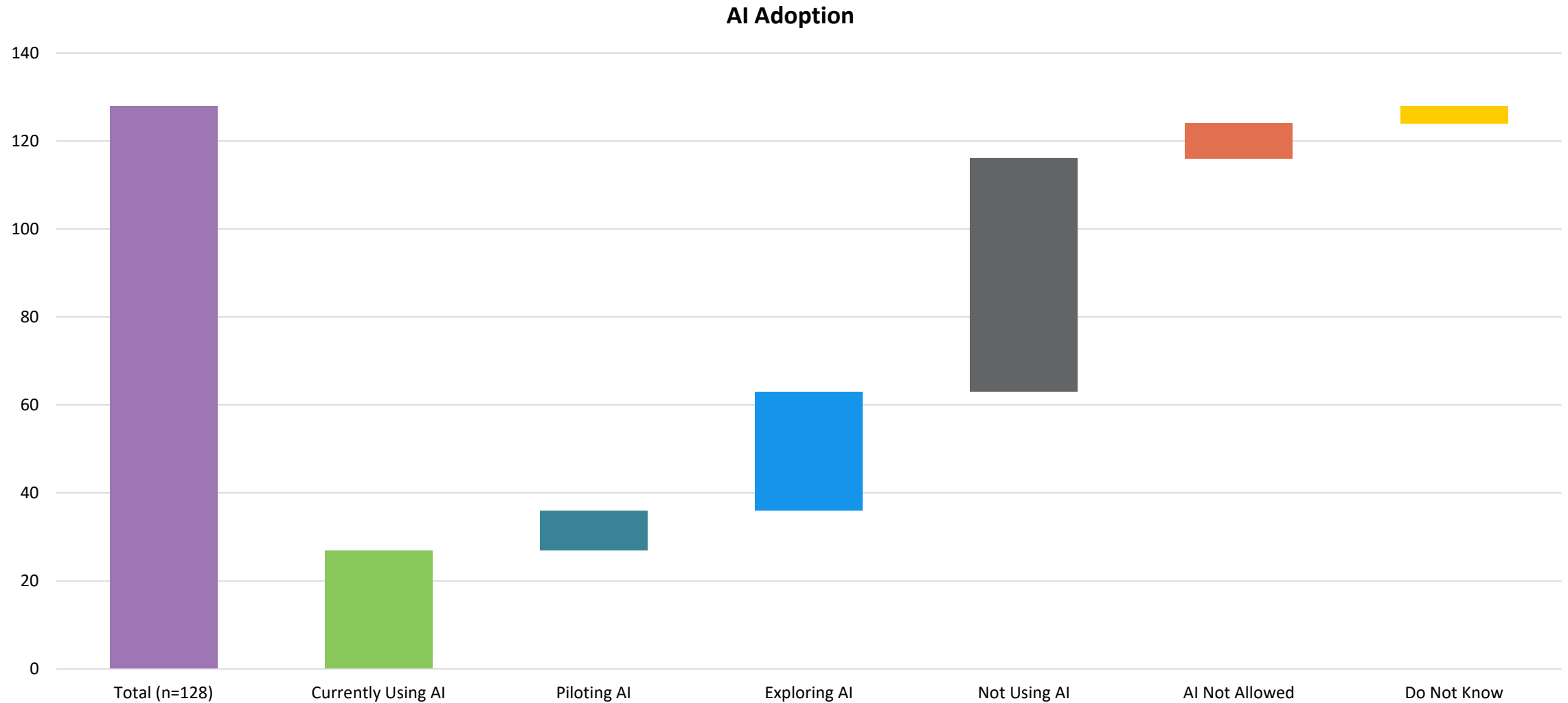
Survey Respondents

Respondents by Agency Type



N=128

Status of AI Use

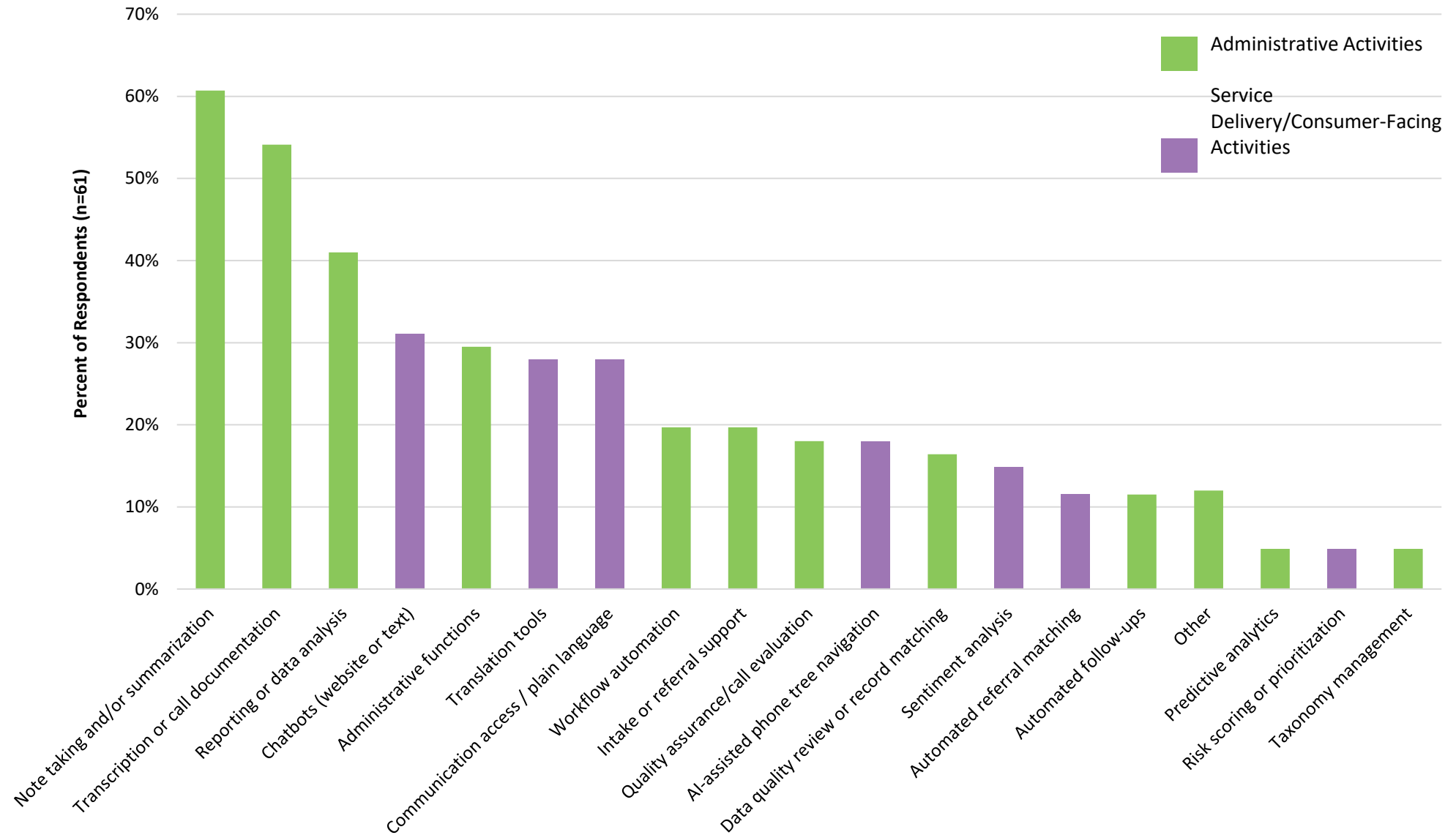


Top
reasons
for non-
use of AI
(n=59):

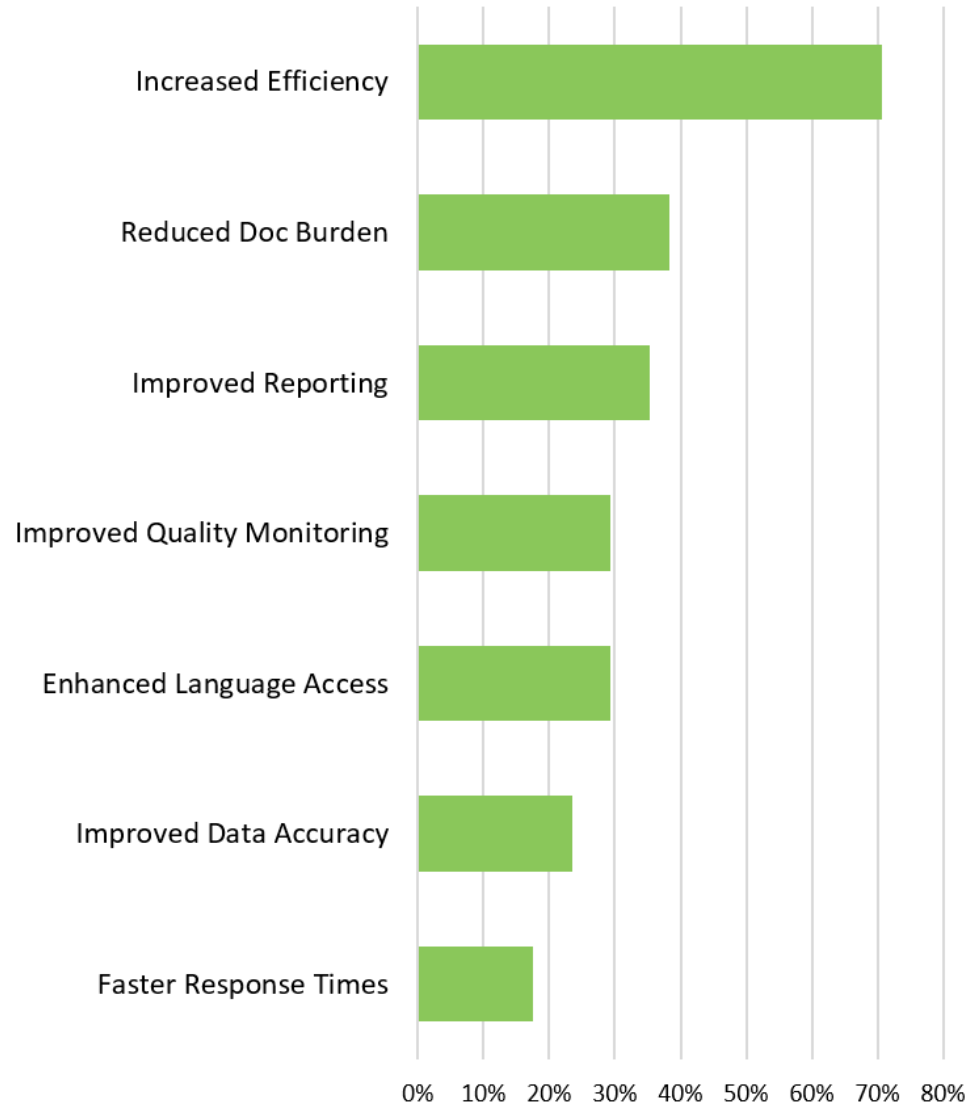
- Privacy concerns (42%)
- Legal or ethical concerns (31%)
- Cost (31%)
- Lack of technical infrastructure (31%)
- Unclear value (25%)
- Policy restrictions (20%)
- Concern about replacing human roles (19%)

Areas of Use

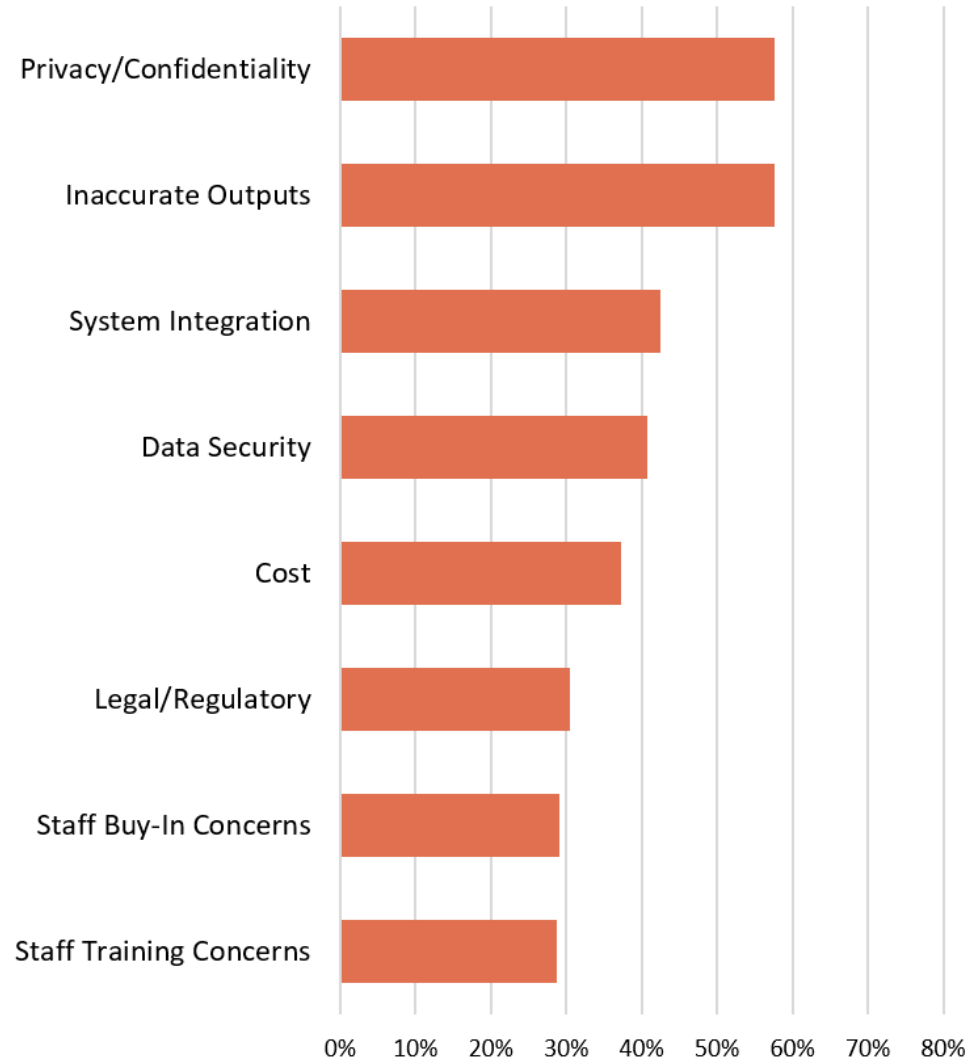
Areas Where AI Is Currently Used, Piloted, or Explored



Top Benefits Reported by AI Users (n=34)



Top Concerns Cited (Users, Pilots & Explorers, n=59)



Benefits & Concerns

Source of AI Tools



Standalone AI tools (e.g., ChatGPT, Claude) – 60%



Embedded in existing vendor platforms – 54%



Tools developed with a vendor – 20%



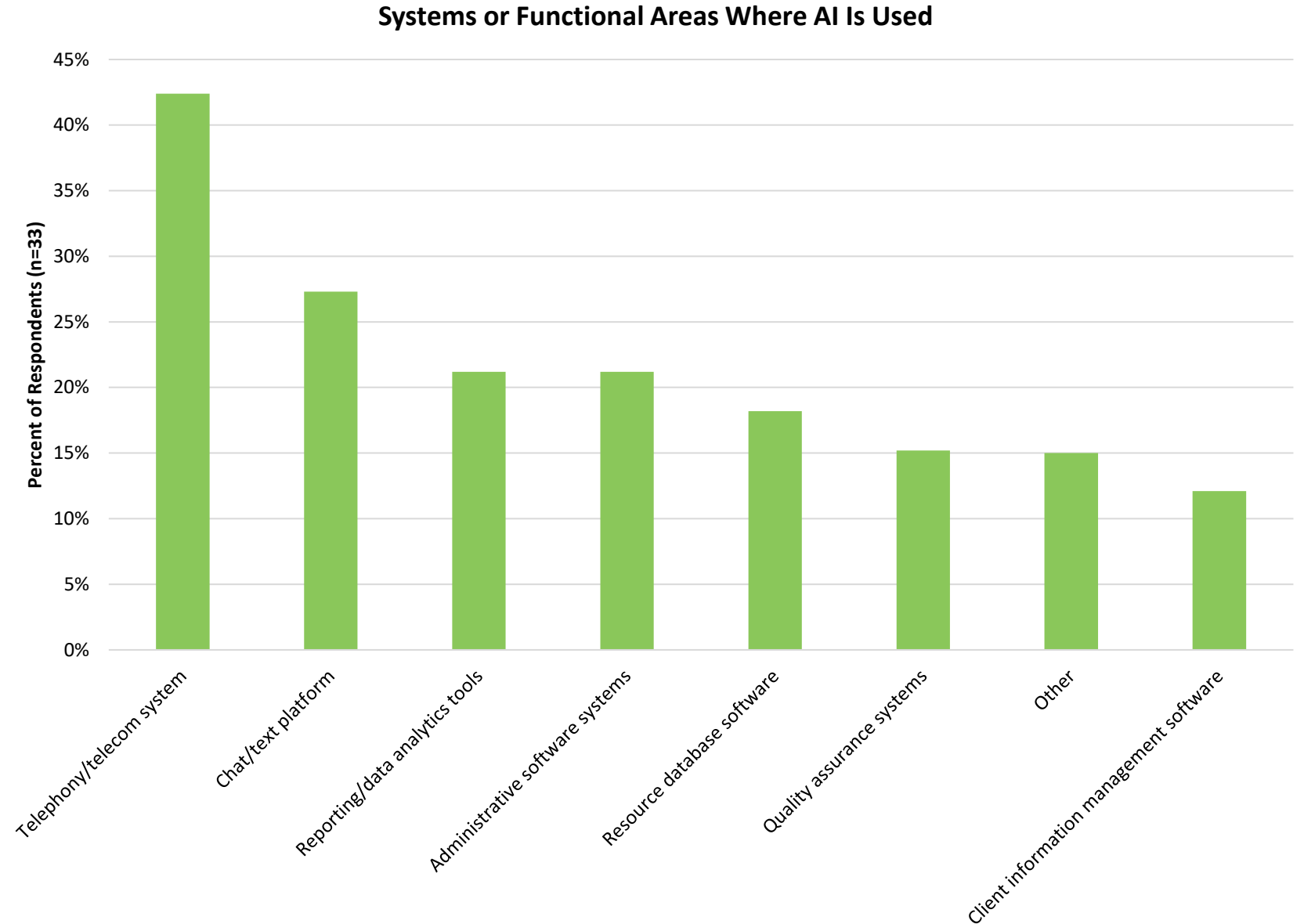
Custom-built tools developed internally – 11%



Embedded in reporting or analytics software – 6%

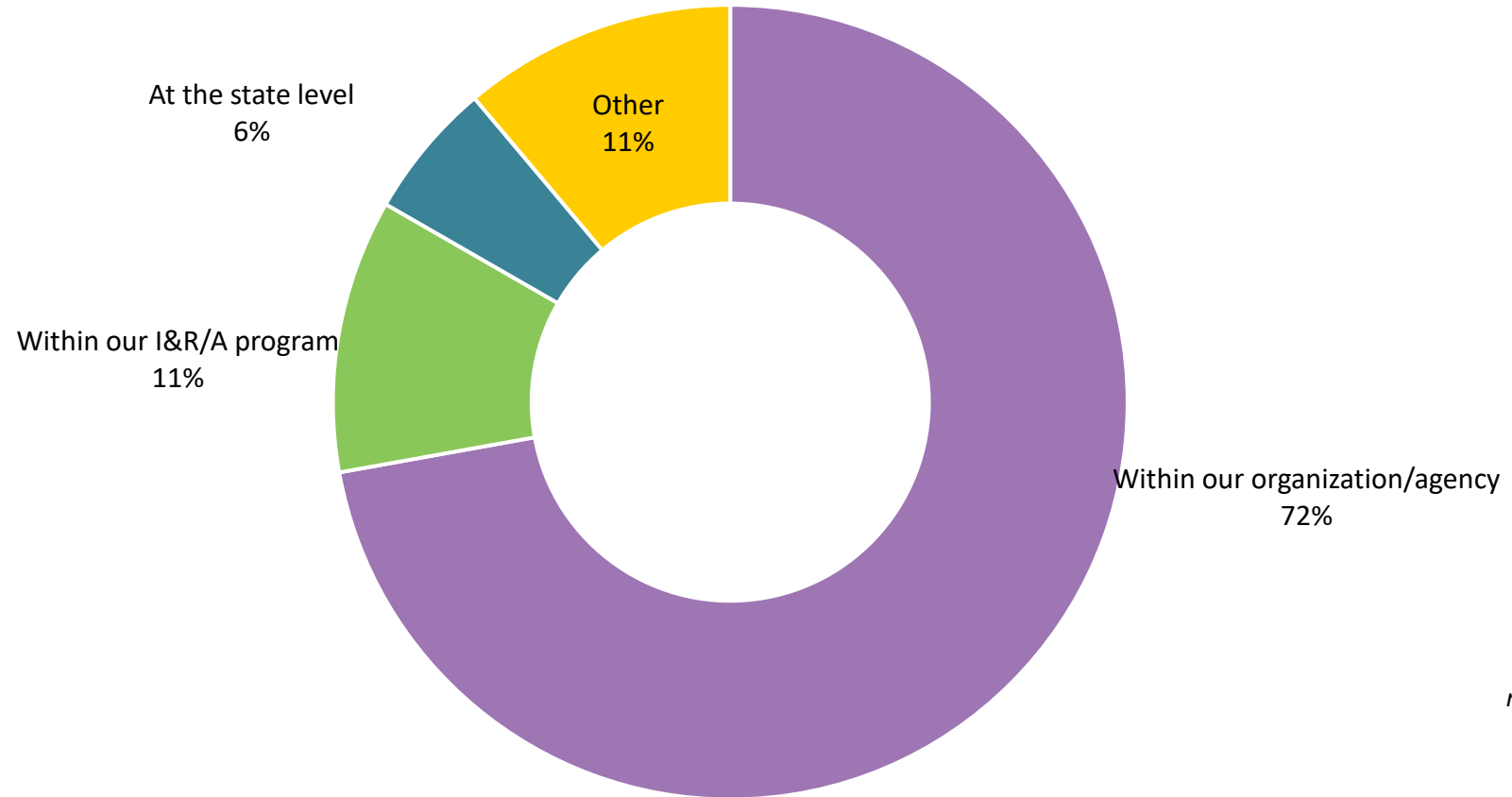
Examples of
platforms used
when AI tools are
embedded:

- *NICE inContact
- *LinkLive
- *Teams/Microsoft
- *RingCentral



AI Governance and Oversight

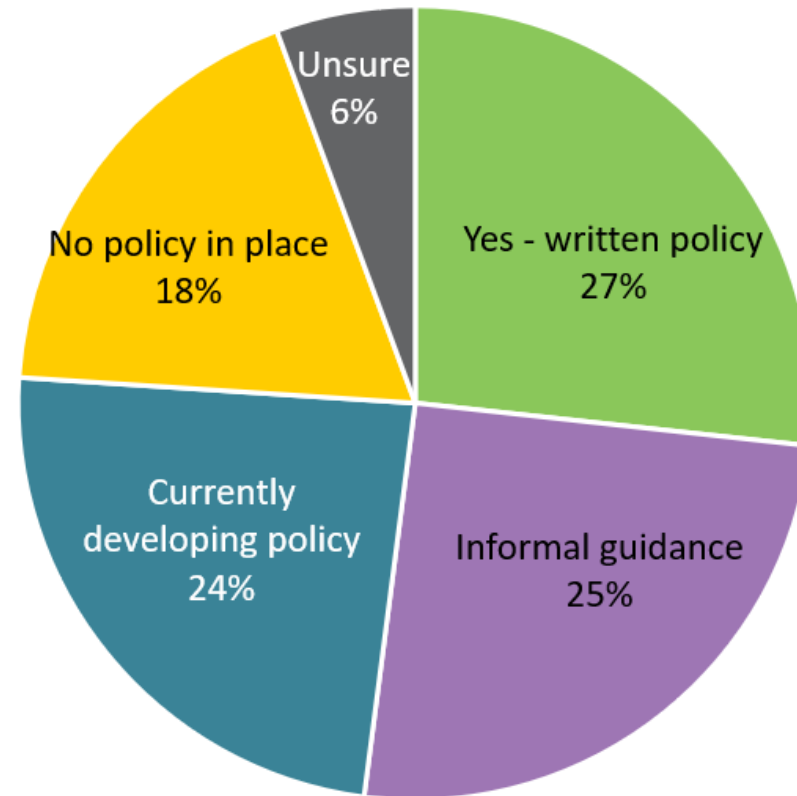
At What Level Does a Formal AI Strategy Exist?



n=17

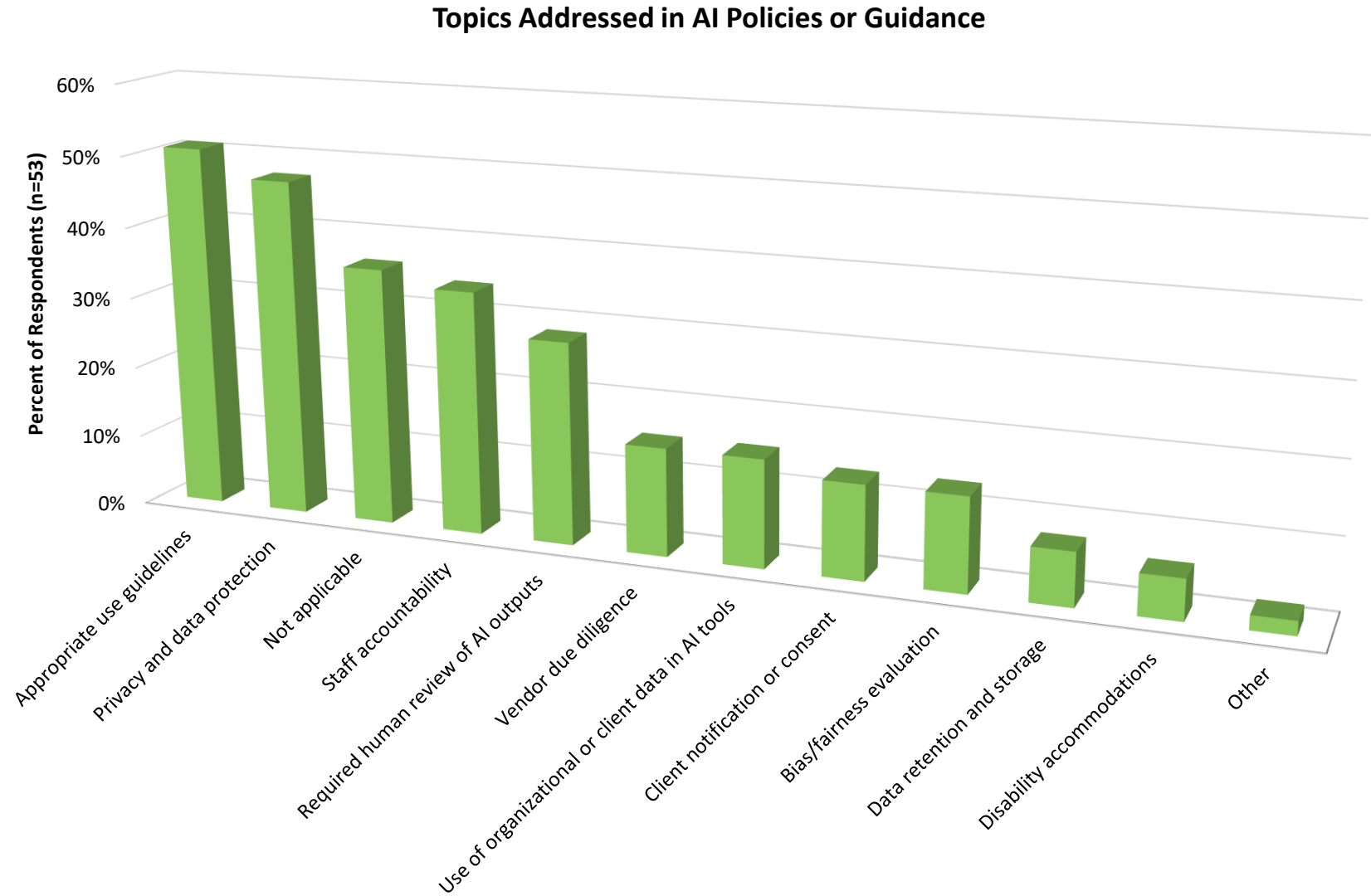
AI Policies and Procedures at the Organizational Level

AI Policies or Procedures Regarding AI Use

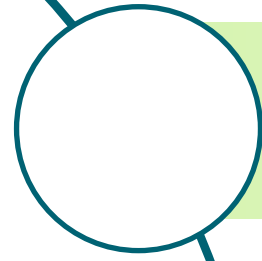


n=61

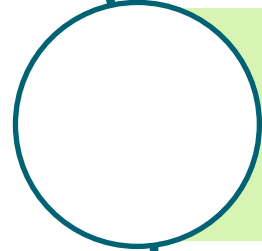
Topics Covered in AI Policies



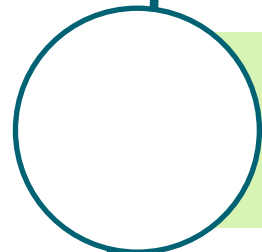
Does your organization provide training on AI tools?



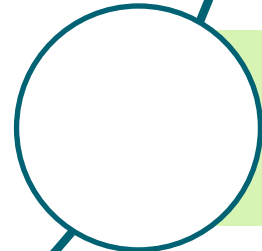
Informal learning only (44%)



Yes - training is provided (24%)

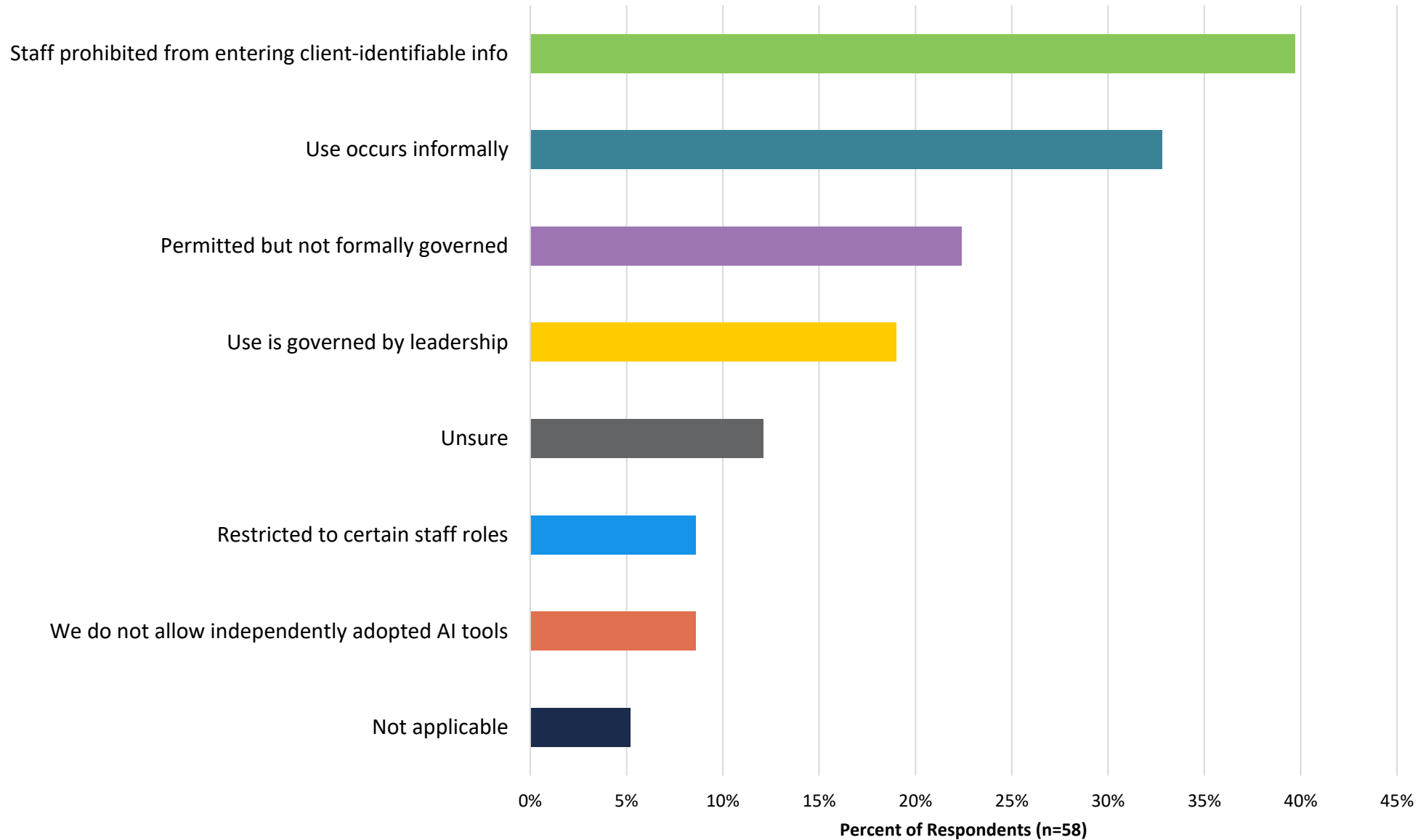


No training provided (18%)



Other/Unsure (15%)

How Are Independently Adopted AI Tools Governed?



Oversight of
Independent
AI Tools
(e.g., Claude,
ChatGPT)

A few examples of creative AI uses

- Our virtual agent collects all the demographic and intake data and asks the caller what their need is. Then the call is passed to a live specialist with all the data collected and suggested search term(s) to help. A summary is also provided.
- I'm able to conduct interviews with satisfied consumers and copy my typed notes into ChatGPT and get an anonymized story for including in grant reporting.
- We are using AI to help create standard operating procedures for many processes that do not have SOPs right now.
- Using interaction analytics to find themes of calls to see what topics are transferred to the next level of assistance.
- We are exploring how AI can help simplify complex information into more accessible formats for consumers, including plain language materials and multilingual content.
- In the beginning stages of implementing our "closed" AI texting feature in which clients can text us with questions. AI will then respond with information or resources or request a call back for our agency.

Field Support Needs

70%

Want Training for Staff

80 of 115 respondents said staff training is the most helpful support — the single highest-rated need across the entire survey

68%

Want Sample Policies & Templates

The second most-requested support — organizations want practical, ready-to-use governance tools they can adapt

62%

Want Peer Learning Opportunities

The field wants to learn from one another — peer exchange ranked above research, legal guidance, and technical assistance

54%

Want Research on Effectiveness

More than half want evidence — outcome data and real-world case studies that show whether AI actually works in I&R/A settings

53%

Want Help Keeping Up with AI Developments

Staying current is a challenge — over half of respondents want curated, relevant updates on a fast-moving landscape

52%

Want Risk Assessment Tools

Organizations want help evaluating AI safely — tools to assess privacy risk, bias, and vendor accountability before adopting

ADVANCING STATES



Leadership, innovation, collaboration
for state Aging and Disability agencies

Nanette Relave, I&R Support Center Director
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This presentation was supported in part by grant number 90EESC0001-01-00 from the Administration for Community Living (ACL), U.S. Department of Health and Human Services (HHS) as part of a financial assistance award totaling \$1,199,905.00 with 75 percent funded by ACL/HHS and 25 percent funded by non-government source(s) in period of performance 08/01/2021-07/31/2026.



From Search to Support

SeniorLine + AI

“Our goal is to help staff get to the right information faster.”

Shannah Tharp Gilliam, Ph.D. • Allegheny County Area Agency on Aging

Info & how we access it has changed quickly...

I&R work is high-volume, high-stakes, and knowledge-heavy.

-2020

Hard Copy
Manuals

2020+

User-driven
Search Tools

2024+

AI working in the
background

2026+

AI participates in
the process

The question for AAAs: which parts of our workflow can AI safely support?

COUNTY CONTEXT

In Allegheny County...

Top 5 topics:

in-home services
home and community-based programs
nutrition, public benefits
housing and utilities.

40,686

calls projected this year

3,391

contacts a month

*SeniorLine is the human front door into aging-services...
high-volume and knowledge-heavy.*

THE I&R PROBLEM

Tools that don't “move with the problem” aren't good enough

Changes fast

Eligibility rules, programs, and local resources change faster than manuals.

Lives everywhere

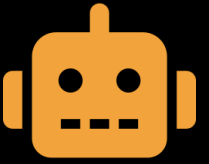
Policies, PDFs, emails, spreadsheets, staff memory.

Hard to use live

Information may be accurate but hard to retrieve during a live call.

Slow onboarding

New staff need months to learn the acronyms, rules, and workflows.



ARIA launched in 2024 Aging Resource Information Assistant

346

questions and answers

13 staff

built it: identifying questions, writing answers

Designed for the public: an external-facing assistant on our website. As we built it, we discovered something we hadn't planned for: it was useful to our own staff too.

DEVELOPMENT PROCESS

How we approached development

1

Public use
case

2

Common
questions

3

Sourced Info

4

Scenario
testing

5

Staff
feedback

6

Refinement

- Designed as a public-facing assistant for the DHS Aging Services website.
- Gathered policies, program descriptions, FAQs, workflows, referral guidance, and scripts.
- The 13 staff who built the Q&A base became ARIA's first users.
- Tested with realistic I&R scenarios. Refined when answers came back wrong, incomplete, or confusing.

Sometimes there IS a wrong door

What the wrong answers taught us:

- Some information lived only in staff memory.
- Some workflows were known in practice but never documented.
- Some updates arrived by email, so the source documents needed constant correction just to stay true.

GOVERNANCE

County approval and the policy environment



Approval took about 6 months, in 4 stages:

- 1 DHS approval to begin the process of using AI
- 2 DHS IT sign-off on the tool
- 3 DHS approval to ask the County to use AI
- 4 County Manager + County IT + Legal approval to use AI

*When it comes to protecting older adults,
innovation doesn't get to outrun accountability.*



We Couldn't Have Done This Alone

CMU's Executive Training in AI for Social Impact:
12 AAA employees across 3 cohorts.

Cohort 1

Learning from AI developers to kickstart tedious tasks and add human expertise on top.

Cohort 2

Applying decision science, including strategies to increase consumers' acceptance of care management plans.

Cohort 3

Co-creating on SkillBuilder.io, the live platform for specialty assistants.

ARIA is 1 of 300 "Skillys"

Skilly.ai = technical capacity

AAA = real workflows, real calls, and service accountability.

RESULTS

ARIA routes Seniors to the Right Human

1,508

conversations

4:14

average length

89%

resolved without
asking for a human

4.85

customer satisfaction
score

2,219 calls to action:

Program Email Address (39%)

Program Phone Number (43%)

Top themes: caregiver support, eligibility and applications, home and community care, nutrition assistance, medical transportation.

IMPLEMENTATION REALISM

Skilly model: pros and cons

GREAT!

- Faster build
- Staff-friendly interface
- Lower barrier to experimentation
- Can organize internal knowledge
- Useful for piloting and learning
- Helps make knowledge searchable

Not So Great!

- Requires ongoing content management
- Accuracy depends on source material
- Outputs need verification
- Staff may over-trust polished answers
- Governance has to keep pace
- Sustainability requires ownership

“There is no way around bad workflows, poor governance, and the need for human accountability.”

HUMAN FRONT DOOR

ARIA links SeniorLine Staff and Public

ARIA now works two jobs.



A First Stop on the Website

It answers routine questions and routes complex needs to a human. 72% of its calls to action point people toward SeniorLine staff.



A Faster Means to the Needle in the Haystack

Quickly sorts through 346 answers that used to live in policies, PDFs, and individual memory.

SeniorLine remains the human front door.
Callers get a better-supported human, and that's the whole point.



Lessons learned for AAAs

- Start with the problem, then pick the tool.
- Build for one audience and you may discover another.
- Human accountability & responsibility rule.
- AI can reveal your documentation gaps. Let it help you.

What common questions do your consumers ask I&R staff?

What can you do for me?

What do I qualify for?

Looking for transportation resources

Ask about meals

I need help! What help is there for me

What services are available?

How can you help me?

What can I get for free

How to receive meals

What programs do we qualify for?

Need transportation

Transportation



Area Agency *on Aging*

Chat with ARIA



An AI Chat assistant available 24/7, ARIA
information and answers.

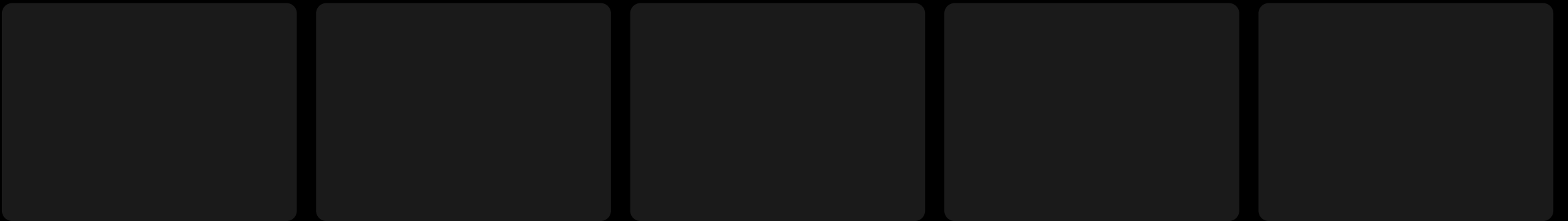
Chat with ARIA



ACTIVITY

Get what you need from AI...

When you don't have the time to do the whole task yourself



GOLD STANDARD

The CLEAR prompt formula

- C** **Context:** What is this for?
- L** **Lens:** What role or perspective should AI use?
- E** **Expectations:** What should the output include or avoid?
- A** **Audience:** Who is this for?
- R** **Result:** What format do you want back?

AI is like a very fast intern with unearned and alarmingly high confidence.

PROMPT QUALITY

Weak prompt

“Tell me about the politicians from Allegheny County and where they stand on Medicaid & SNAP. What can we ask them for?”

PROMPT QUALITY

Strong prompt

You are a policy analyst preparing briefing materials for mtgs w/ 2 PA Senators by Allegheny County AAA.

Task 1: Summarize their public stances on federal funding in 2 – 3 sentences on each: Medicaid & SNAP

Task 2: List 2 – 3 concrete levers each member could pull to support these programs. Match levers to each member's actual committee assignments, subcommittee seats, caucus memberships, letters to agency heads, co-sponsorships, and constituent-facing actions.

Format: One page per member, then a bulleted lever list.

If you can't find a documented position, say so. Don't infer from party affiliation.

Write at a level a program director can skim in 5 minutes before walking into the meeting.

Verify current officeholders before answering.

After drafting, flag anything where your sourcing is thin so I can verify it before I rely on it in the room.

ACTIVITY

Get what you need from AI...

**When you don't know what to tell
AI to do**

PROMPT QUALITY

Strong prompt to Get a Strong Prompt

“I'm going to Washington DC next week to meet with Allegheny County legislators. I'm not sure what to tell them, what to ask them for. I don't know anything about their stances on Medicare and Medicaid. Can you help me write a strong prompt to get the information I need to learn their stances and also to create something to leave behind so that they can remember our conversation?”

Role. Audience. Purpose. Boundaries. Format.

SMALL-GROUP ACTIVITY

Choose one scenario and build a prompt

A Program director: regulation tracking

A new APD is 40 pages, and somewhere inside it the rules changed. You need to know exactly what's different and what your programs must do about it.

B Staff training

A new SeniorLine staff person starts Monday. You want a training scenario that teaches them to recognize layered needs when a caller asks for one service.

C Advocacy: legislative visit

You and a senior center administrator are visiting state legislators to ask for increased funding. You need persuasive talking points and a one-page handout to leave behind.

D Administrator: public communication

Your agency is adding a waitlist for a popular service. You need a plain-language notice for I & R that explains what happens next and avoids promising timelines you can't keep.

PROMPT CHEAT SHEET

Build a Better Prompt with these Questions:

Context: What is the situation?

Lens: What role should AI take?

Task: What do you want AI to do or make?

Audience: Who is the output for?

Guardrails: What should AI avoid or verify?

Format: What should the final output look like?

Tone: Plain language, professional, warm, direct, trauma-informed?

SHARE-OUT

What made your prompt stronger?

Listen for context, audience, guardrails, and reviewability.

1 What scenario did you choose?

2 What did you include to make the output more useful?

3 What guardrail did you include?

4 What would you still need to verify?

A good prompt makes AI output easier for a human to review.

CLOSING

**The future of I&R is human connection,
strengthened by better access to knowledge.**

*Used responsibly, AI can protect what matters most in I&R: the
human connection at the center of the call.*

Accuracy

Access

Equity

Dignity

Privacy

Trust

Shannah.Gilliam@alleghenycounty.us



USAging

Leaders in Aging Well at Home



eldercare
locator

Connecting You to Community Services

[Eldercare.acl.gov](https://eldercare.acl.gov)

Overview of AI Tools for I&R

- **Quality & Supervisor Support**
- **Coaching & Conversation Insights**
- **Frontline AI Assistance**
- **Administrative & Operational**

AI Tools for Quality & Supervisor Support

- **Automated Evaluations**- AI scores interactions using QA criteria.
- **Custom Phrase Detection**-AI identifies keywords, behaviors, and trends.
- **Sentiment Analysis**- AI detects customer tone and sentiment.

AI Tools for Coaching & Performance Improvement

- **Personalized Coaching** — AI identifies strengths and improvement areas to support agent development.
- **Conversation Analysis** — AI reviews interactions to identify trends, sentiment, and agent behavior.

AI Tools for Frontline Assistance

Real-Time Agent Support Tools

- **Auto Pilot** — AI provides automated support for calls, chat, SMS, and email interactions.
- **Co-Pilot** — AI assists agents during live interactions with suggested responses.
- **Auto Summary** — AI automatically generates interaction summaries and key action points.

Administrative & Operational AI

Back-Office Efficiency & Communication

External AI Support Tools (Not Integrated within the Telecom System)

- **Data Analysis & Reporting** — AI identifies trends and patterns to improve reporting and decision-making.
- **Taxonomy Simplification** — AI standardizes categories and definitions to improve data consistency.
- **Internal Communications** — AI assists with drafting and summarizing internal communications.

AI Tools Currently in Use

Eldercare Locator uses the following AI-enabled tools to support quality, efficiency, and communication:

- Automated Evaluations
- Custom Phrase Detection
- Auto Summary
- Data Analysis & Reporting
- Internal Communications

Group Discussion & Feedback

- What types of **rules and policies** should guide AI use?
- What **ethical and practical concerns** should be considered in the implementation of AI in I&R programs?
- How could **front-line staff and consumers** your organization serves be involved in AI tools development, implementation and review?

What types of rules and policies should guide AI use?

Protection confidential hipa

Use of only verified information from reliable sources.

Should be a closed system specific to aging network and guidance

HIPAA, consent, ensuring that all parties are understanding of what will be searched and how

Data provided should meet programmatic compliance guidelines

Source data should be current and accurate within 6-12 months or as frequent as latest program directives

Privacy and company regulations to protect consumers.

Who is responsible for updating the knowledge base

Do not humanize AI, it's a great tool for research and reports but shouldn't replace ANY consumer facing activities.

Transparency on data use

Be transparent that AI is being used, maybe even what its limitations are. And people should know when content

Providing advice to a customer outside

What ethical and practical concerns should be considered in the implementation of AI in I&R programs?

Staff time and overall costs. Are we using it to enhance our services and access to information.

Environmental and energy cost impacts and effects on Elders

Should identify when AI is responding and when it is a person.

Environmental impact

Safety Correct info Ease of understanding Privacy

Providing full disclosure when used in any case. Also review and confirm information obtained.

Accessibility to the internet

Responses should not be restrictive (i.e., based upon race, gender, ethnicity, income, etc.)

Protection of PII

Using AI to provide advice to consumers outside of your knowledge base.

How could staff and consumers be involved in AI tools development, implementation and review?

Training staff to use it and getting feedback on how they can/will use it. Test groups of consumers and getting feedback on what is and is not being addressed.

Maintenance of community resource information

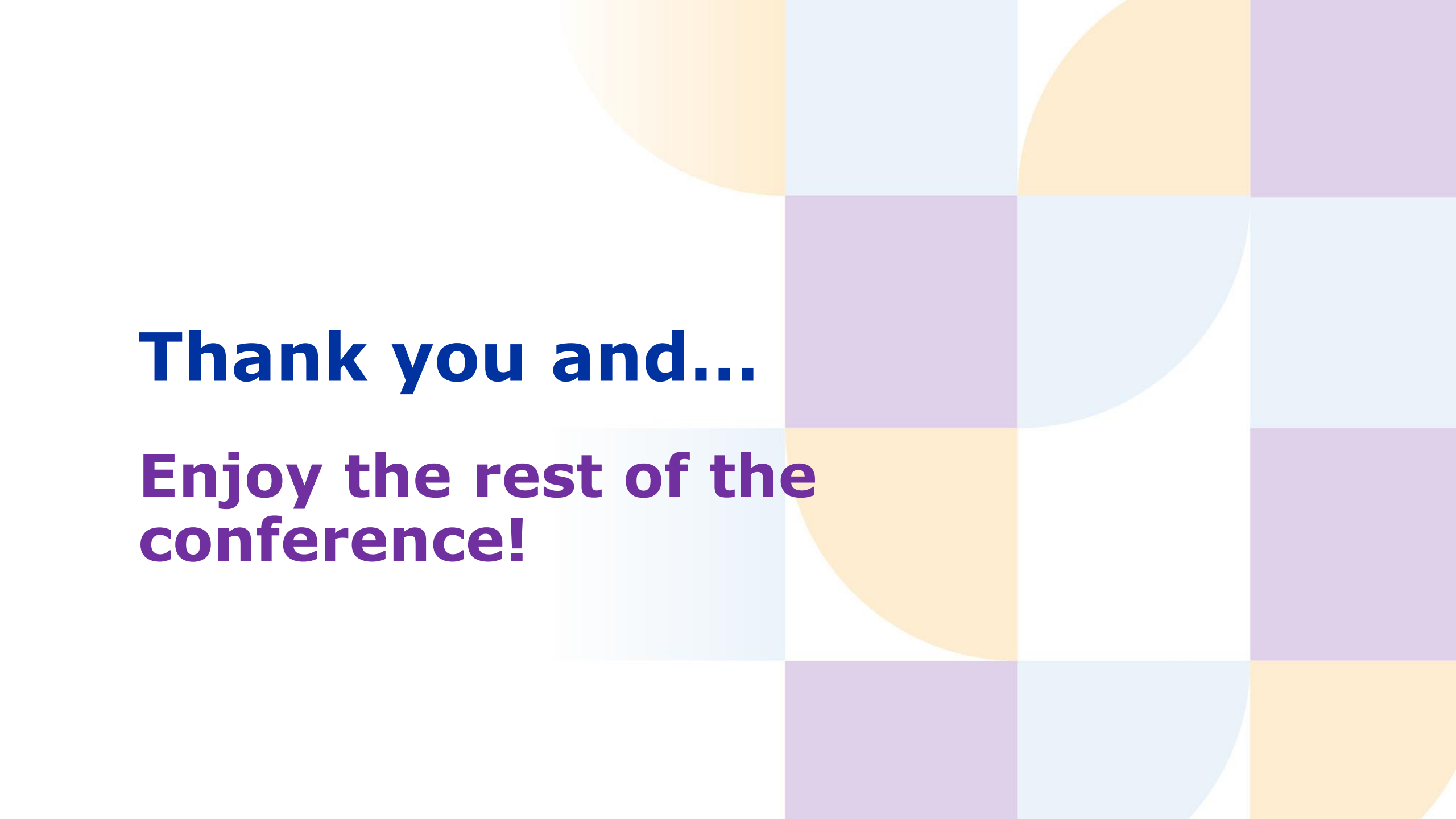
Exposure to research uses pros and cons informing them to understand their choices as well as how as a tool that it might be used

Focus group of consumers to see what interest they have in using AI

Develop and vet the knowledge base

Surveys, town hall discussions, pilot programs & feedback, usage feedback

Consumer communication preferences and needs



Thank you and...

**Enjoy the rest of the
conference!**