



FAMILY & CLIENT SERVICES

Thurs
5/14

PEER GROUP AGENDA

Room: Chesapeake 9

9:00AM - 9:20AM

SUMMIT INFORMATION SESSION

9:30AM - 12:00PM

BEST PRACTICES IN CASE MANAGEMENT & DOCUMENTATION

Berneitha McNair, Berneitha McNair Consulting

12:00PM-1:00PM

LUNCH ON YOUR OWN

1:00PM - 2:45PM

REWIRE TO RISE: CBT-BASED TOOLS FOR COACHING CLIENTS

Alison Rumler-Gomez, Grow Me Consulting/CAP60

2:45PM - 3:00PM

BREAK

3:00PM-5:00PM

TRANSFORMATIONAL EMPATHY: BEYOND “US” AND “THEM”

Dr. Tracy Whitaker, Howard University

5:30PM - 7:30PM

WELCOME RECEPTION

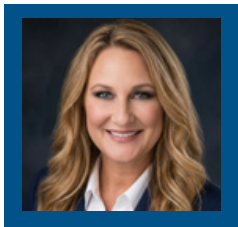
The Flight Deck - 141 American Way, Oxon Hill, MD

Next Generation Case Management: Foundations for Practice and Impactful Documentation



Berneitha McNair

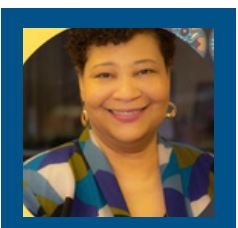
This session provides a comprehensive introduction to effective case management in Community Action, grounded in a strengths-based, family-centered approach. Participants will explore the core fundamentals of building rapport, assessing needs, setting meaningful goals, and connecting families to appropriate resources. Through hands-on strategies for writing clear, concise case notes and improving data entry practices, participants will enhance the quality, consistency, and integrity of their documentation. By the end of the session, participants will be equipped with both the foundational skills of effective case management and the tools to accurately capture and communicate the results of their work in a way that supports compliance and tells a meaningful story of impact.



Alison Gomez

Rewire to Rise: CBT-Based Tools for Coaching Front-Line Clients

As AI tools begin to take on documentation and administrative tasks, front-line staff are gaining time for deeper, more meaningful connections with clients. Rewire to Rise explores how to use that time effectively, introducing a next-generation approach to coaching rooted in Cognitive Behavioral Therapy (CBT). Participants will learn how to move beyond resource navigation to address the thought patterns that influence behavior and long-term outcomes. Through hands-on activities, this session equips participants with practical strategies to help clients build resilience, shift unhelpful thinking, and make lasting change. Participants will leave with immediately applicable coaching tools and a clear vision for how front-line work can evolve when the administrative burden lifts.



Dr. Tracy Whitaker

The Power of Transformational Empathy: Moving Beyond “Us” and “Them”

Transformational empathy is a powerful approach to dismantling the divide between social workers and clients. By focusing on authenticity, intentionality, and commonalities, transformational empathy erases the line between “us” and “them.” In this workshop, participants will learn to define transformational empathy and distinguish it from traditional empathy and compassion; analyze how power, language, and assumptions shape relationships between social workers and clients; and apply transformational empathy principles to real-world practice situations to reduce “othering” and promote equitable engagement.