



Workshops for Broker Delivery

March 2018



To help you serve your clients, we have developed five workshops you can deliver to your Berkley DP policyholders. Your workshop attendees will earn AIA/CES Learning Units (LUs) and Professional Development Hours (PDHs). Because they are Berkley DP–authored programs, these workshops will also qualify your clients for a 15% risk management education credit.*

WORKSHOPS



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For more information, please refer to the catalog entries, which include program descriptions and learning units.



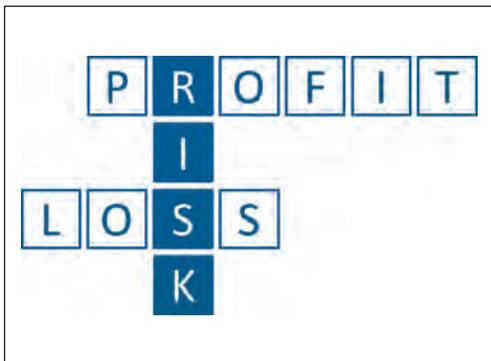


Developing a Risk Management Plan for Your Firm

Design firms face risk every day. At times, the practice of architecture or engineering can feel like a minefield. The purpose of this workshop is to help guide you through without getting blown up by risk.

Risk management for design professionals *is* practice management. A proactive Risk Management Plan is an essential element of loss prevention and a key ingredient of financial success for a design firm.

When a Risk Management plan is integrated into a firm's culture and embraced by its leadership, it makes a significant positive impact on business performance and longevity. You'll gain strategies and tools to help you develop an effective plan that contemplates the entire project cycle: from client selection to project inception and through project close-out.



Learning Objectives

1. Recognize the importance of having a Risk Management Plan
2. Be able to distinguish between two broad types of risk for design professionals and identify the four parts of the risk management model
3. Understand the purpose and composition of a Risk Management Team
4. Learn the seven components of an effective Risk Management Plan:
 - Project/client selection
 - Team capabilities
 - Contract review and negotiation
 - Contract education for the design team
 - Communication and documentation
 - Project and quality management
 - Staff training and development

Target Audience

Firm principals, market/segment leaders, branch managers, and technical leaders who are involved with developing, implementing, or maintaining standards and procedures

Learning Units: 1.5 AIA CES LUs / 1.5 PDHs



Managing Risk through Effective Communication and Documentation

Communication is essential to every part of a project. Good communication can help ensure a project's success, while poor communication can lead to disputes and claims. Documentation is the narrative of the project process that forms the legal project record and is critical in managing both the project and client expectations. After being awarded a project commission, the communication and documentation process begins with contract formation and negotiation, flows through project initiation and design phase milestone reviews, and becomes very formal during the construction phase. This workshop explores communication and documentation best practices through a project's phases and takes a closer look at document retention, the perils of email, the management of digital data, and the importance of an owner's informed consent when working with innovative design solutions.



Learning Objectives

1. Be able to establish a more effective documentation management program within a design practice
2. Recognize and use more effective documentation in project management
3. Understand BIM documentation considerations
4. Maintain effective document retention priorities

Target Audience

Firm principals, project managers, and other senior and mid-level professional staff involved in project leadership

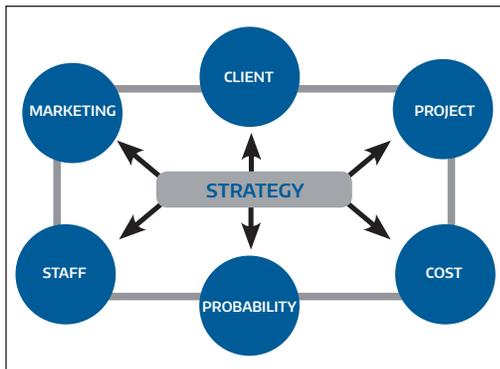
Learning Units: 1.5 AIA CES LUs / 1.5 PDHs



The Go/No-Go Process: Promoting Effective Marketing and Risk Management

You'll frequently hear insurance companies talk about the Go/No-Go process simply as a means to avoid risk. That's certainly an important part of the decision-making process, but this practice-focused workshop recognizes that projects are the lifeblood of your business and that your marketing efforts are investments—ones that have significant impact on the bottom line.

Because a structured and systematic Go/No-Go process can help you make decisions more objectively and better manage the cost of marketing new business, we've developed a flexible yet strategic approach that encourages active thought and discussion to reach a reasonable conclusion. This workshop addresses the identification of key factors in making the Go/No-Go decision.



Learning Objectives

1. Learn how to make Go/No-Go decisions with greater objectivity
2. Recognize how marketing decisions must work in concert with strategic goals, revenue objectives, and operational realities
3. Identify the criteria that factor into an objective Go/No-Go decision
4. Understand how to develop a win strategy based on the information that has been gathered

Target Audience

Firm principals, senior project managers, and any staff involved in the acquisition of clients or projects

Learning Units: 1.0 AIA CES LUs / 1.0 PDHs



Understanding Your Contract: The Foundation for Successful Projects

Understanding the purpose and content of a professional services agreement is an essential skill in project management. The contract establishes the intent and parameters of the project and confirms the roles, responsibilities, and expectations of the parties. A fair and balanced agreement sets the stage for a productive relationship between you and your client and fosters a positive experience throughout the project.

This comprehensive program provides an overview of risk management fundamentals, the contract review process, and the typical organization of the owner-design professional agreement. You will examine key contract elements: initial project information, scope of services, client responsibilities, cost of the Work, general terms and conditions, and compensation. There is a brief review of the General Conditions of the Contract for Construction; and, depending upon the length of the workshop, a detailed look at up to 20 clauses in a professional services agreement including additional terms and conditions, specific disclaimers and exclusions, and special circumstances.



Learning Objectives

1. Understand the organization and key components of a professional services agreement
2. Clearly establish the project parameters and scope of design services
3. Understand standard terms and conditions
4. Explain purpose and importance of special contract clauses

Target Audience

Firm principals, contract officers/managers, project managers, and other senior and mid-level professional staff involved in project leadership

Learning Units: Varying program lengths from 2 to 4 AIA CES LUs / 2 to 4 PDHs
HEALTH, SAFETY, AND WELFARE QUALIFIED



From Scope Creep to Profitability: Managing Change and Your Client's Expectations

Change challenges the basic premise of project management: the control of resources to meet a certain objective by a specific date within a finite budget. Scope creep happens when there is an expansion of services provided without a corresponding increase in the design professional's fees or recognition of additional risk exposure. The good news is that while change is inevitable, scope creep is not. This workshop will help you learn the triggers for change and how to manage the change process to maintain your client relationships—and your firm's profitability.



Learning Objectives

1. Recognize that concise definition of scope of project and services is a critical component of contract administration
2. Identify potential risks in reduction of professional services in construction documents and construction administration
3. Learn strategies to identify and control modifications to construction systems, material and products through change management
4. Learn how to manage the implications of change through proactive communication and documentation

Target Audience

Firm principles, market/segment leaders, branch managers and technical leaders who are involved with developing, implementing or maintaining standards and procedures

Learning Units: 1.5 AIA CES LUs / 1.5 PDHs,
HEALTH, SAFETY, AND WELFARE QUALIFIED



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Practice management recommendations should be carefully reviewed and adapted for the particular project requirements, firm standards, and protocols established by the design professional.

Products and services are provided by one or more of insurance company subsidiaries of W. R. Berkley Corporation. Not all products and services are available in every jurisdiction, and the precise coverage afforded by any insurer is subject to the actual terms and conditions of the policies as issued.

Each policy year, firms that participate in one or more Berkley DP education programs qualify for a single 15% risk management education credit that will be included in rating and reflected in the firm's next policy quotation. Please note that the education credit opportunity applies only to primary policies; excess policies are not eligible.

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