



Risk Management Learning Plan Catalog

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Better By Design®



Berkley DP's comprehensive risk management program focuses on fundamental areas that impact professional liability, project delivery, and practice management with materials that have been developed by leading architectural and engineering practitioners, insurance specialists, and legal professionals.

BDP Risk® is Berkley DP's award-winning learning platform, which provides access to relevant risk and practice management resources, courses, and activity tracking.

To help you make the most out of BDP Risk® we have created seven learning plans made up of complementary courses that enhance your knowledge in a particular topic area.

Why should you enroll in a learning plan?

BDP Risk® offers a vast amount of on-demand courses, and Learning Plans to help you navigate courses by organizing them into categories. There are tailored plans for all levels of experience, which will help your firm reduce exposure to risk, improve management practices, enhance business performance, earn learning units, and qualify for risk management education premium credits.*

What will you learn?

From new staff members to seasoned principals, everyone at your firm has something to learn. Each learning plan features material presented by subject matter experts. You'll learn the challenges and best practices in each topic area and walk away with tools, templates, and strategies to manage risk and your practice.

How does a learning plan work?

When you enroll in a learning plan, you will have automatic access to the included courses, allowing you to easily complete a course and move on to the next one. The learning plans and courses are listed in the recommended sequence, but you may complete them in any order, based on your level of experience and knowledge.

How do I enroll in a learning plan?

- Click the COURSES & LEARNING PLANS tile on the main dashboard, and you'll see the learning plans at the top of the page.
- Select any learning plan to view its description and the "Structure" tab to see included courses.
- When you find the right learning plan, click the "Enroll" button to get started.

AVAILABLE LEARNING PLANS

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We are a registered provider with the AIA's Continuing Education System (CES). We are also a registered provider with the Registered Continuing Education Program (RCEP), which is a nationwide portal for professional development education and record-keeping for engineers, surveyors and related industry professionals.

We do not register programs with any individual states. It is the design professional's responsibility to determine whether this activity meets the requirements set forth by his/her state licensing board.



NEW HIRES/ONBOARDING

[>>View Learning Plan](#)

This learning plan provides a broad overview of professional liability issues and helps attune new firm members to the importance of risk management in daily practice.

You'll explore key risk management fundamentals and gain insights into the importance of project/client selection, contracts, and project/quality management. You'll learn the pitfalls and best practices in communication and documentation, with a special focus on email communication. In addition, this learning plan will identify common ethical issues for design professionals and provide guidance and templates to identify and respond to those challenges.

COURSES

- Developing a Risk Management Plan
- Managing Risk through Effective Communication and Documentation
- Design Professional Email Policies and Best Practices
- Ethical Challenges & Enigmas for the A/E World



RISK MANAGEMENT BASICS

[>>View Learning Plan](#)

This learning plan is a great place to start—whether you're new to the practice of architecture and engineering or looking to brush up your knowledge of risk management basics.

You'll explore key risk management fundamentals and gain insights into the importance of project/client selection, team capabilities, and project/quality management, with an emphasis on the:

- Pitfalls and best practices in communication and documentation
- Contract review process and clauses that impact your risk exposure
- How to manage change while maintaining your client relationships
- Specific cyber liability risks for design professionals

COURSES

- Developing a Risk Management Plan
- Managing Risk through Effective Communication and Documentation
- Managing Risk through Effective Contracts
- From Scope Creep to Profitability
- Cyber Liability: Data Security for Design Professionals



[>>View Learning Plan](#)

This learning plan will take your risk and project management knowledge to the next level.

Building on your understanding of “Risk Management Basics,” you’ll begin with a review of the importance of a well-structured and coordinated design team and strategies to help you get there. Then, you’ll take a deeper look into the organization of a professional services agreement, examine key elements, and receive sample language.

Moving into project delivery and management, you’ll explore legal and practical implications of using BIM and other 3D technologies and how these can add value to the design and construction process. Then you’ll take a fresh look at today’s construction phase challenges to deliver a project that is in conformance with design intent and meets the client’s objectives. The learning plan wraps up with a detailed review of the AIA A201™-2017, a document that defines the obligations of the key project participants: owner, architect (design professional), and contractor. The A201 enables a design understanding each party’s roles and responsibilities and facilitates a framework for effective communication and management of successful projects.

COURSES

- The Prime/Subconsultant Team: Strategies for Coordinated Success
- Understanding Your Contract: The Foundation for Successful Projects
- Managing the Legal and Practice Issues of BIM
- Optimal Outcomes in CCA: Managing Risk During Construction
- Understanding AIA Document A201-2017: General Conditions of the Contract for Construction



[>>View Learning Plan](#)

In this advanced learning plan, you’ll learn about current and evolving topics that impact your projects and gain strategies to more effectively manage risk.

Drawing on real-world examples, you’ll explore the trend of municipalities outsourcing certain inspection functions to design professionals, how to identify and deal with ethical challenges, and the wide world of dispute resolution methods. You’ll review actual claim cases to learn from others’ mistakes, wrapping up with an insightful look at current issues of resiliency, climate change, and other design and construction perils.

COURSES

- Trends in Outsourcing Responsibilities to Architects and Engineers
- Ethical Challenges & Enigmas for the A/E World
- A Design-Professional’s Guide to Dispute Resolution
- Claim Catastrophes & Lessons Learned
- Could This Happen to You? A Compendium of Claim Tales and Lessons Learned
- Designing for Uncertainty: Resiliency, Climate Change, and Other 21st Century Perils



ALTERNATIVE PROJECT DELIVERY METHODS

[>>View Learning Plan](#)

This learning plan focuses on specific project delivery methods and explores the risks, rewards, and best practices in Design-Build, P3, Construction Management, and more.

You'll start with an overview of the variety of project delivery methods in the industry, followed by a closer look at both private and public design-build projects. You'll learn what you need to know about Construction Manager at Risk projects. Finally, you'll gain an understanding of the legal and financial risks of participating in a P3 project.

COURSES

- Alternative Forms of Project Delivery
- Design-Build: Boom or Bust? Managing the Risks
- Design-Build: Public Infrastructure Projects: Risks and Challenges
- What You Need to Know about Construction Manager as Constructor
- P3: Myths and Realities for Design Professionals



LEADERSHIP AND PRACTICE MANAGEMENT

[>>View Learning Plan](#)

Designed for both experienced and emerging firm leaders, this learning plan will enhance your understanding of essential business- and staff-management areas.

From the practice management side, you'll learn the importance of strategic planning for architecture and engineering firms, and review the use of key performance indicators to enable profitable performance and value creation.

The leadership portion of the plan will offer guidance on firm perpetuation through the development of emerging leaders in the areas of influencing others, team motivation, and managing change. You'll also gain insights into overcoming generational gaps and effectively leading a remote workforce.

COURSES

- The Secrets of Successful Strategic Planning
- Enhancing Design Firm Value through Profitability and Effective Business Management
- Design Firm Leadership: 3 Key Skills for Leaders
- Next Generation Leadership: Proven Strategies to Engage & Develop Millennials at Work
- Digital Workforce: Strategies to Work, Collaborate, and Lead Effectively Across Remote Teams



[>>View Learning Plan](#)

This comprehensive learning plan will help you understand and manage risk in contract review, negotiation, and beyond. Your professional services agreement is an essential tool in managing your exposure to risk—since it establishes the intent and parameters of the project and confirms the roles, responsibilities, and expectations of the parties.

You'll begin with an overview of the contract management process and the top-ten clauses that impact your risk exposure. Then, you'll take a deeper look into the organization of a professional services agreement, examine key contract elements, and receive sample language. Next, you'll take a look at some common deal-breakers and contract issues that can arise from pre-bid negotiation through post-construction. In addition, you'll receive an overview of changes in the 2017 AIA Owner-Architect Agreements. You'll learn the importance of planning for conflict by defining a dispute resolution process in your contract, go through the mechanics, cost, pros, and cons of various methodologies, and you'll review actual claim cases to learn from others' mistakes. You'll wrap up with a detailed review of the AIA A201™-2017, a document that bridges the gap between the owner's separate contracts with the design professionals and contractor.

COURSES

- Managing Risk through Effective Contracts
- Understanding Your Contract: The Foundation for Successful Projects
- A/E Contractual Deal Killers
- AIA 2017 Contract Documents: Insights and Impacts
- A Design-Professional's Guide to Dispute Resolution
- Claim Catastrophes & Lessons Learned
- Understanding AIA Document A201-2017: General Conditions of the Contract for Construction



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About Berkley Design Professional

At Berkley Design Professional, we are Better by Design®. We transform uncertainty into opportunity so our clients can confidently build a better tomorrow. We provide design firms with innovative and comprehensive Architects & Engineers Professional Liability Insurance. We offer state-of-the-art, award-winning risk and practice management guidance and resources that help our policyholders manage their exposures and improve their businesses. Our in-house claims professionals provide fair, results-oriented claims management. Our mission is to relentlessly protect our clients' work, reputation and dreams. Berkley Design Professional is a division of Berkley Alliance Managers, which is a member company of W. R. Berkley Corporation whose rated insurance company members are assigned an A+ (Superior) rating by A.M. Best. berkleydp.com

Information provided by Berkley Design Professional is for general interest and risk management purposes only and should not be construed as legal advice nor confirmation of insurance coverage. As laws regarding the use and enforceability of the information contained herein will vary depending upon jurisdiction, the user of the information should consult with an attorney experienced in the laws and regulations of the appropriate jurisdiction for the full legal implications of the information.

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 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.

**Our on-demand programs qualify for AIA CES Learning Units (LUs) and RCEP Professional Development Hours (PDHs). 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 premium quotation. Please note that the education credit opportunity applies only to primary policies; excess policies are not eligible.*



BDP Risk® Learning Management System

BDP Risk® is Berkley DP's state-of-the-art Learning Management System, which provides online access to relevant risk and practice management content, courses, learning plans, and activity tracking and reporting. Winner of six coveted Brandon Hall Group Excellence Awards in the past five years, BDP Risk® received a 2023 Gold Award in the "Best Advance in Custom Content" category for the creation of learning plans tailored for specific roles and topic areas to help customers more easily find and complete relevant coursework, resulting in increased engagement.



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