

# Risk Management Workshops

January 2026

## RISK MANAGEMENT PROGRAM OVERVIEW

Through our partnership with your specialist professional liability insurance broker, Berkley Design Professional offers workshops that help strengthen your firm's risk management practices, improve business performance, earn continuing education credits, and qualify for a 15% risk management education rating credit at renewal\*.

Berkley DP's comprehensive risk management program focuses on core areas that influence professional liability, project delivery, and practice management. Workshop content is developed by experienced architectural and engineering professionals, insurance specialists, and legal experts to provide practical, relevant, and actionable guidance.

These workshops are designed to help firms:

- Avoid professional liability claims
- Improve management practices
- Support strategic growth and operational efficiency
- Earn continuing education credits and qualify for a 15% risk management education rating credit\*

Contact us:

[risk-support@berkleydp.com](mailto:risk-support@berkleydp.com)

831.293.6248

### Registered Provider Notice



Berkley Design Professional is a registered provider with the AIA Continuing Education System (CES) and the Registered Continuing Education Program (RCEP)—a platform for professional development education record-keeping for engineers, surveyors and related industry professionals.

Workshops qualify for:

- AIA CES Learning Units (LUs)
- RCEP Professional Development Hours (PDHs)

*Please note: Berkley DP does not register programs with individual state licensing boards. It is the responsibility of each design professional to determine whether a given activity meets the continuing education requirements of a specific state.*

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## Claim Case Study Workshop: Doc Outside the Box

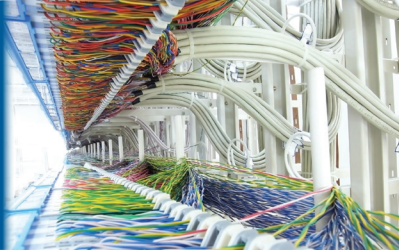
Learning Units:  
1.5 AIA CES LUs / 1.5 RCEP PDHs



This interactive workshop explores a complex hospital project for the design and construction of a new patient tower, renovation of the emergency room, kitchen, and dining area, and seismic upgrades. Through a detailed project scenario, you'll identify key missteps, analyze contributing factors, and collaborate on strategies that could have reduced professional liability, addressed code compliance, and better aligned with client expectations. Guided discussion and problem-solving exercises will offer practical insights you can apply in your own projects to manage risk more effectively.

## Claim Case Study Workshop: Subterranean Substitution Blues

Learning Units:  
1.5 AIA CES LUs / 1.5 RCEP PDHs



This hands-on case study examines the design and construction of a large-scale data center for a multinational financial services firm. With systems expected to generate intense heat, temperature control was a crucial design priority. However, the owner's cost-cutting approach led to limited construction observation, allowing a subcontractor to substitute materials without informing the owner or the design team. You'll engage in a collaborative review of the scenario, uncovering project breakdowns and identifying actions that could have led to a different outcome. Guided discussion will reveal practical strategies to help you improve project delivery and reduce liability.

## Could This Happen to You? A Compendium of Claim Tales and Lessons Learned

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



This program tells the tale of four real-life claims. For each case, the stage will be set with a description of the project type, delivery method, and parties involved. You will follow the unfolding of each scenario, from the initial problems and technical issues that sparked the claim to its resolution and lessons learned. Then, you'll explore the impact of the design professionals' errors and omissions, along with how those missteps affected project outcomes and stakeholder trust. Through structured storytelling and expert analysis, you'll gain valuable insights to strengthen business practices, enhance project controls, and reduce professional liability exposure.

## Could This Happen to You? A Compendium of Claim Tales and Lessons Learned: Season 2

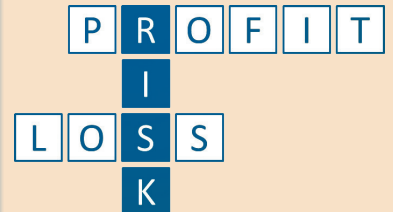
Learning Units:  
1.5 AIA CES LUs / 1.5 RCEP PDHs  
HEALTH, SAFETY & WELFARE QUALIFIED



This program presents four more claim scenarios. Each case begins with an overview of the project type, delivery method, and parties involved, followed by the problems that arose and led to the claim. The resolution, lessons learned, and health-safety-welfare implications of each case are revealed, offering practical takeaways for design professionals. Claim highlights include poor business practices, building code violations, inadequate communication and documentation, and QA/QC failures. You'll gain insights to help strengthen project oversight, improve documentation, and reduce professional liability exposure.

## Developing a Risk Management Plan for Your Firm

Learning Units:  
1.5 AIA CES LUs / 1.5 RCEP PDHs



Design firms face risk at every stage of a project. This workshop will equip you with strategies and tools to develop a proactive Risk Management Plan that supports business performance and long-term success. When embedded into firm culture and championed by leadership, a strong plan can help avoid costly missteps. You'll explore the full project cycle—from client selection through project close-out—and learn how to address strategic planning, contract review, communication, QA/QC, and staff development to reduce liability and improve outcomes.

## From Scope Creep to Profitability

Learning Units:  
1.5 AIA CES LUs / 1.5 RCEP PDHs



Change is inevitable, but scope creep doesn't have to be. This workshop helps you recognize the early signs of scope creep and manage change effectively to protect client relationships and firm profitability. You'll explore common triggers, learn how to set clear expectations, and develop strategies to control change through proactive communication, consistent documentation, and a well-defined change management policy. By the end of this session, you'll be better equipped to navigate evolving project demands while keeping your scope and your bottom line on track.



## Managing Risk through Effective Communication and Documentation

Learning Units:  
1.5 AIA CES LUs / 1.5 RCEP PDHs



Clear communication and consistent documentation are essential to successful project delivery—and critical tools for managing risk. This workshop draws on practical project examples to illustrate both pitfalls and best practices throughout the project lifecycle, from contract formation to post-construction. You'll learn how proactive communication and structured documentation can prevent disputes, support change management, and strengthen project outcomes.

## Managing Risk through Effective Contracts

Learning Units:  
1.0 AIA CES LUs / 1.0 RCEP PDHs



A well-crafted professional services agreement is one of the most powerful tools for managing risk in A/E practice. This workshop offers practical strategies for crafting fair, insurable contracts that clearly define roles, responsibilities, and expectations. You'll learn how to navigate the contract review process (from proposal through project delivery) and examine ten key clauses that influence risk exposure. Whether drafting agreements or reviewing them, this session will help you approach contracts with greater confidence and clarity.

## Proactive Construction Administration: Strategies, Solutions, and Success

Learning Units:  
1.5 AIA CES LUs / 1.5 RCEP PDHs



The construction phase is where a project truly comes to life, and the design professional's role in construction contract administration (CCA) is essential to its success. At its core, CCA helps determine whether the project is being built in general conformance with the design intent. Using the A201™-2017 as a framework, this workshop explores the roles of the client, design professional, contractor, and subcontractors. You'll gain practical strategies for fostering collaboration, identifying issues early, reducing risk, and supporting successful project delivery.

## The Go/No-Go Process: Risk Analysis of Client, Project and Team

Learning Units:  
1.5 AIA CES LUs / 1.5 RCEP PDHs



While the Go/No-Go process is often viewed as a tool for risk avoidance, this practice-focused workshop emphasizes its broader value in supporting informed decision making throughout project pursuit and execution. Evaluating the qualifications and capabilities of the client, project, and internal team is essential to aligning opportunities with strategic goals and operational realities. This workshop introduces a flexible yet structured approach to Go/No-Go decision making that promotes objective analysis, encourages thoughtful discussion, and supports marketing effectiveness. You'll explore key evaluation criteria and learn how to apply a strategic framework that proactively manages risk and enhances business performance.

## Understanding Your Contract: The Foundation for Successful Projects

Learning Units:  
1.5 AIA CES LUs / 1.5 RCEP PDHs



Understanding the purpose and content of a professional services agreement is a critical skill in effective project management. The contract establishes the intent and parameters of the project, confirming the roles, responsibilities, and expectations of the parties involved. A fair and balanced agreement lays the groundwork for a productive client relationship and fosters a positive project environment. This comprehensive workshop provides an overview of the contract review process and the typical structure of an owner–design professional agreement, including the key contract elements of initial project information, scope of services, client responsibilities, cost of the Work, general terms and conditions, compensation, contractor responsibilities, and specific disclaimers and exclusions. You'll learn how to interpret and refine contract terms to manage risk more effectively, clarify responsibilities, and build stronger client relationships from the start.



# Berkley

## Design Professional

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### For More Information, Contact:

#### **Jeannette Vaccarezza**

Manager,  
Risk Management Education  
[jvaccarezza@BerkleyDP.com](mailto:jvaccarezza@BerkleyDP.com)

#### **Diane P. Mika**

Senior Vice President,  
Risk Management Officer  
[dmika@BerkleyDP.com](mailto:dmika@BerkleyDP.com)

#### **Website**

[berkleydp.com](http://berkleydp.com)

[bdprisk.com](http://bdprisk.com)

### 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.

*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.*