



# Risk Management Education Catalog

January 2026



## RISK MANAGEMENT PROGRAM OVERVIEW

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

Through our library of materials on BDP Risk®, live webinars, and on-demand learning courses, we address risk management essentials such as scope, client/project selection, contracts, and legal issues, as well as key practice topics including leadership, ownership transition, and firm valuation. We also provide tools and guidelines to help our insureds avoid professional liability claims, improve management practices, enhance business performance, and qualify for a 15% risk management education rating credit\*.

**Information:** Practical information in your hands—whenever you need it.

- Available on a Mobile App
- Comprehensive library of risk and practice management articles and whitepapers for a fresh perspective on current issues
- Guidelines, tools, templates, and checklists to use in your everyday project delivery and management
- Robust search feature

**Education & Tracking:** Courses that can help you develop your team members and qualify for a risk management education rating credit.

- On-demand webinars
- Nano eLearning courses
- AIA Learning Units / RCEP Professional Development Hours (some HSW qualified)
- Downloadable certificates of completion on demand
- Participation tracking and reports

**Expertise:** Developed by leading subject matter experts.

- Risk and practice management from the practitioner's perspective
- **Ask the Expert!** feature on every article, tool, and course on the LMS—ask a question, and an expert will reply to you, pronto!



*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. Our on-demand programs qualify for AIA CES Learning Units (LUs) and 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.*

“  
*I understand how difficult it is to produce a well-presented topic in a specific amount of time. These [courses] are very well done and there are great takeaways.*  
”

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## PROGRAM LEADERS

### Andrew D. Mendelson, FAIA

EVP, Chief Risk Management Officer  
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*Andy is a unique resource for Berkley DP and our policyholders because of his 36+ years as a licensed architect, working as a designer, project manager, market leader, contracting officer, CFO, and Director of Practice Management for a large, national multi-disciplinary design firm. Andy served on the AIA Documents Committee for 15 years and is an industry leader in contracting and risk management.*

### Diane P. Mika

SVP, Risk Management Officer  
831.293.6243

[dmika@berkleydp.com](mailto:dmika@berkleydp.com)

*Diane has over 25 years of experience in A/E professional liability insurance, focused on risk management and loss prevention education. She holds a bachelor of science degree in organizational behavior and is also a certified instructional designer. In her career, she has led in-depth claims studies to reveal the breakdowns in business practices that can lead to risk exposure. Diane has translated that heightened awareness of the risks that design professionals face into meaningful education and resources that help engineers and architects adopt practices to avoid or mitigate loss.*

## RISK MANAGEMENT PROGRAM WORKSHOPS

### AIA 2017 Documents: Owner-Architect Agreements & Sustainable Design and Construction

Learning Units:  
1.5 AIA CES LUs / 1.5 RCEP PDHs



**AIA Contract Documents**



AIA Owner-Architect Agreements are updated every 10 years to reflect industry consensus and balance. This program offers insights into the AIA revision process and key changes to the agreements. The workshop leader will review updated contract language, discuss legal and risk implications, and introduce the new Sustainable Projects Exhibit. Participants will learn how to choose and evaluate contracts for their projects and practice.

### Alternative Forms of Project Delivery

Learning Units:  
1.5 AIA CES LUs / 1.5 RCEP PDHs



The purpose of this program is to compare and contrast construction delivery methods and implications for the design professional with insights from the owner's perspective. It includes a thorough review of Design-Bid-Build, Construction Manager as Adviser (CMA), Construction Manager as Constructor (CMc, CMAR, CMGC), and Design-Build. For each of these delivery methods, the program will explore: the relationships of the parties and the contract structures; key features of the delivery method; practice and legal risk considerations for the design professional and owner; and wraps up with the benefits and concerns of the delivery method.

## Claim Case Study Workshop: Doc Outside the Box

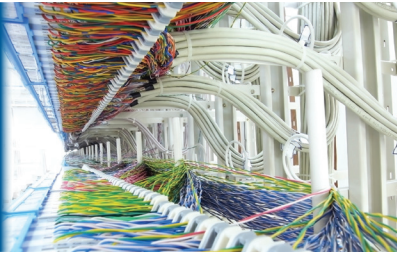
Learning Units:  
1.5 AIA CES LUs / 1.5 RCEP PDHs



This case study workshop centers on a 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, participants will 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.

## Claim Case Study Workshop: Subterranean Substitution Blues

Learning Units:  
1.5 AIA CES LUs / 1.5 RCEP PDHs



This case study follows the design and construction of a massive data center for a global financial firm. With heat control critical, the owner cut costs by limiting construction observation. A subcontractor then made an unauthorized material substitution, risking system failure. When discovered, the owner filed claims against the design team and contractors. Participants will engage in a collaborative review of the scenario, uncovering project breakdowns and identifying actions that could have led to a different outcome.

## 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 claims. For each claim, the workshop leader will set the stage by describing the project type, delivery method, and parties involved, followed by the problems that arose and technical factors that led to the claim. The resolution and lessons learned of each case will be revealed, including the impact of the design professionals' errors and omissions on the project and its owners/users. These valuable insights will help participants examine and improve their business practices and project controls to avoid similar situations.

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

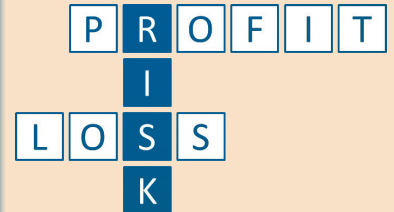
Learning Units:  
1.25 AIA CES LUs / 1.25 RCEP PDHs  
HEALTH, SAFETY & WELFARE QUALIFIED



This program presents four more claim scenarios. The speakers will set the stage by describing the project type, delivery method, and parties involved, followed by the problems that arose and led to the claim. The final resolution, lessons learned, and health-safety-welfare takeaways of each case will also be revealed. Highlights of the claims include poor business practices, building code noncompliance, lack of communication and documentation, and QA/QC issues. Participants will learn how to avoid or mitigate similar situations.

## Developing a Risk Management Plan for Your Firm

Learning Units:  
1.0-1.5 AIA CES LUs /  
1.0-1.5 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. Participants will 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 participants recognize the early signs of scope creep and manage change effectively to protect client relationships and firm profitability. Attendees will 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, participants will be better equipped to navigate evolving project demands while keeping their scope and 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. Participants will 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 professional services agreement is an essential tool to help architects and engineers manage exposure to risk. An equitable contract fairly apportions risk, while an onerous contract can shift inordinate—and sometimes uninsurable—liability to design professionals. The terms and conditions of the agreement establish the roles and responsibilities of the parties, and the negotiation process provides an opportunity to set reasonable expectations with clients. This workshop reviews the risk management fundamentals that underlie the development of effective contracts, the contract review process, and key clauses that impact risk exposure.

## Managing the Legal and Practice Issues of BIM

Learning Units:  
1.5 AIA CES LUs / 1.5 RCEP PDHs



When used effectively, BIM boosts productivity, quality, and collaboration. Combined with Integrated Project Delivery, it adds value through cost modeling, virtual coordination, and digital documentation. This workshop covers required investments in technology, training, and quality standards, plus legal issues like Standard of Care, IP protection, contract tools, and liability risk.

## Navigating Challenges to Design Firm Growth and Expansion

Learning Units:  
1.0 AIA CES LUs / 1.0 RCEP PDHs



A/E/C firms face multiple exposures to risk and growth by acquisition and their ability to manage multiple offices, coordinate a distributed workforce, streamline documentation, train new staff, and implement proper project delivery methods.

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

Learning Units:  
1.5 AIA CES LUs / 1.5 RCEP PDHs



Construction Contract Administration (CCA) is critical to project success. Simply put: the purpose of CCA is to determine, in general, whether the project is being built in conformance with the design intent. Using A201™-2017 as a guide, this workshop examines the roles of all parties and provides strategies to foster collaboration, spot issues early, reduce risks, and deliver projects effectively.

## Professional Communication in the Digital Workspace

Learning Units:  
1.0 AIA CES LUs / 1.0 RCEP PDHs



In today's digital-first workplace, design professionals routinely generate and share vast amounts of electronically stored information (ESI)—from emails and texts to drawings, reports, and project records. This practical, scenario-based workshop equips design professionals with the knowledge and tools to manage ESI responsibly and reduce risk exposure. Through real-world examples and actionable strategies, attendees will gain insight into smarter email habits, documentation practices, and project record management.

## Reviewing Contracts for Professional Liability Coverage and Risk

Learning Units:  
1.25 AIA CES LUs / 1.25 RCEP PDHs



Before signing on the dotted line, architects and engineers should carefully review contracts to ensure alignment with project-specific requirements, firm standards, and professional liability insurance (PLI) coverage. This workshop illustrates the contract lifecycle, provides a comprehensive step-by-step review process, and presents real-world examples of client-drafted agreement language. Participants will learn how to identify and amend contract language to enhance insurability.

## Risk Management Essentials of the New Normal

Learning Units:  
1.0 AIA CES LUs / 1.0 RCEP PDHs



In today's rapidly evolving AEC landscape, risk management fundamentals are more critical than ever. This course explores how post-pandemic shifts, emerging technologies, and changing client expectations are reshaping professional liability exposure for architects and engineers. Participants will gain actionable insights and tools to protect your firm and enhance risk resilience in the "new normal."

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

Learning Units:  
1.5 AIA CES LUs / 1.5 RCEP PDHs



The Go/No-Go process is key to risk management, helping evaluate client, project, and team capabilities for informed decisions. A structured approach improves objectivity and controls marketing costs. This workshop explores critical factors in making Go/No-Go decisions through a flexible, strategic framework that promotes active discussion.

## The Prime/Subconsultant Team: Strategies for Coordinated Success

Learning Units:  
1.5 AIA CES LUs / 1.5 RCEP PDHs



At the heart of almost every successful construction project is a well-structured and coordinated design team. By contrast, poor coordination leads to failure. This workshop presents an eight-step model for building effective teams, covering early subconsultant involvement, contracts, insurance, planning, communication, risk signs, and post-project reviews, with real-world examples of what works—and what doesn't.

## 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 an essential skill in project management. 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 workshop provides an overview of risk management fundamentals, the contract review process, and the typical organization of the owner-design professional agreement.

“

*This workshop was very effective and appreciated, especially because it was developed by a design professional, which brought perspective to the program that others would not have.*

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Berkley DP policyholders can access courses 24/7 on BDP Risk®. For more information, refer to the catalog entries, which include program descriptions, learning units, and the industry experts we have collaborated with to bring you programs that are **Better By Design®**.



**Nano eLearning Courses:** 15–30 minute eLearning courses, focused on a single topic. Great for accessing on our Go.Learn app.



**On-Demand Webinars:** Focused on current and emerging issues—in partnership with subject matter experts around the country.

## GO.LEARN MOBILE APP



BDP Risk® offers an award-winning experience in a mobile app. You can search the LMS for content, read articles, enroll in courses, and download.

### Getting Started:

1. Download the Go.Learn App
2. Enter the platform URL: <https://bdprisk.docebosaas.com>
3. Enter your normal Username and Password

Detailed [Mobile App Instructions](#)

Login to [BDPRISK.com](https://bdprisk.com) for the most up-to-date course list.

## NANO eLEARNING COURSES



### Making a Go/No-Go Decision on a Project Takeover

Learning Units: 0.5 AIA CES LUs / 0.5 RCEP PDHs

Taking over a project started by another design professional is a risky proposition. In addition to concerns for liability, copyright, and professional responsibility, the Go/No-Go decision will likely be influenced by the identity of the client or the project, by the state of the economy and your business, and by your appetite for risk. This course will help you understand the risks, make a reasoned decision, and be able to protect yourself in contract.



### Branching Out: Addressing the Risks and Rewards of Opening a Branch Office

Learning Units: 0.5 AIA CES LUs / 0.5 RCEP PDHs

There are very few company events that generate as much excitement as opening a new branch office. As an implementation of your firm's growth and expansion strategy, a new branch can expand your firm's reach, signal healthier revenues, and offer positive opportunities for the firm and key personnel. However, turning a new branch office into a long-term successful venture is not always easy. Opening an office in a new territory has many potential pitfalls, whether you are acquiring an existing firm or starting from scratch. This course looks at the risks and potential obstacles to opening and running a branch office and gives you five key strategies for success.

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### Accessibility Issues in Design and Construction

Learning Units: 1.5 AIA CES LUs / 1.5 RCEP PDHs

Design professionals must navigate complex accessibility laws and regulations. This webinar reviews key legal frameworks and real-world cases affecting architects and engineers. You will learn actionable steps that design professionals can take to minimize exposure to such issues in the first place.

#### SPEAKERS

**Michael J. Cremonese**, Esq., Member, Burke Cromer Cremonese  
**Scott R. Samolovitch**, Esq., Associate, Burke Cromer Cremonese  
**Andrew D. Mendelson**, FAIA, EVP, Chief Risk Management Officer, Berkley DP



### A/E Contractual Deal Killers

Learning Units: 2.0 AIA CES LUs/2.0 RCEP PDHs

This webinar offers valuable insights into navigating contractual agreements for architects and engineers. You will explore top strategies when addressing the most common Deal-Breaker issues; the importance of both preferred indemnity language and anti-indemnification statutes along with civil codes; and a broad spectrum of critical contracting issues typically arising on projects from the earliest stages of pre-bid negotiation through the post-construction phase.

#### SPEAKERS

**Dion N. Cominos**, Esq., Firmwide Managing Partner, Gordon & Rees LLP  
**Andrew D. Mendelson**, FAIA, EVP, Chief Risk Management Officer, Berkley DP



### AIA 2017 Contract Documents: Insights and Impacts

Learning Units: 2.25 AIA CES LUs / 2.25 RCEP PDHs

AIA Owner-Architect Agreements are updated every 10 years to reflect industry consensus and balance. This program offers insights into the AIA revision process and key changes to the agreements. Experts will review updated contract language, discuss legal and risk implications, and introduce the new Sustainable Projects Exhibit. You will learn how to choose and evaluate contracts for their projects and practice.

#### SPEAKERS

**Ted D. Levin**, P.E., Partner, Morris Polich & Purdy LLP  
**Andrew D. Mendelson**, FAIA, EVP, Chief Risk Management Officer, Berkley DP



### A Design Professional's Guide to Dispute Resolution

Learning Units: 2.25 AIA CES LUs / 2.25 RCEP PDHs

Disputes in design and construction are inevitable—planning ahead is key. This webinar covers common causes of disputes and how to prevent them through clear contract language and defined resolution processes. Learn the pros and cons of negotiation, mediation, arbitration, and litigation, plus how to spot early warning signs and respond effectively.

#### SPEAKERS

**Ted D. Levin**, Esq. Member, Clark Hill  
**Andrew D. Mendelson**, FAIA, EVP, Chief Risk Management Officer, Berkley DP



### Claim Catastrophes and Lessons Learned

Learning Units: 2.0 AIA CES LUs/ 2.0 RCEP PDHs

Whether or not you have been involved in litigation, this webinar will be an eye-opener as to how things can go wrong in a design and construction project. The lessons from real claims catastrophes presented by an experienced trial attorney and a licensed architect will show how devastating failures lead to claims. Through the examination of a number of actual claim cases, you will learn from others' mistakes.

#### SPEAKERS

**Brian K. Stewart**, Esq., Hon. AIA Attorney at Law, Collins Collins Muir + Stewart, LLP  
**Andrew D. Mendelson**, FAIA, EVP, Chief Risk Management Officer, Berkley DP



### Connectable: Strengthen Team Connection in the New Era of Work

Learning Units: 1.25 AIA CES LUs/1.25 RCEP PDHs

A colossal 72% of global workers feel isolated at least monthly; with 55% saying at least weekly. Remote work, advancing technology, and an always-on work culture are fracturing our relationships resulting in deep disconnection. Ryan Jenkins distills everything you need to know about what's causing today's workforce disconnection and how you can increase connection to boost belonging, engagement, retention, and performance with employees at every level.

#### SPEAKERS

**Ryan Jenkins**, CSP, WSJ Bestselling Author & Speaker  
**Diane P. Mika**, SVP, Risk Management Officer, Berkley DP



## 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, AND WELFARE QUALIFIED

This webinar tells the tale of four claims. Our claim examiners describe the project type, delivery method, and parties involved, followed by the problems that arose and technical factors that led to the claim. The resolution and lessons learned of each case will be revealed, including the impact of the design professionals' errors and omissions on the project and its owners/users. These valuable insights will help you examine and improve your business practices and project controls to avoid similar situations.

### SPEAKERS

**Diane P. Mika**, SVP, Risk Management Officer, Berkley DP  
**Cindy Russell**, AVP, Sr. Claims Examiner, Berkley Alliance Managers  
**Michael Cecere**, AVP, Sr. Claims Examiner II, Berkley Alliance Managers  
**Liz Molina**, AVP, Sr. Claims Examiner, Berkley Alliance Managers  
**Derek E. Steffen**, AVP, Sr. Claims Examiner, Berkley Alliance Managers



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

Learning Units: 1.75 AIA CES LUs / 1.75 RCEP PDHs  
HEALTH, SAFETY, AND WELFARE QUALIFIED

This webinar presents four more claim scenarios. Our claim examiners will set the stage with an outline of the project type, delivery method, and parties involved, followed by the problems that arose and led to the claim. The final resolution, lessons learned, and health-safety-welfare takeaways of each case will also be revealed. Highlights of the claims include poor business practices, building code noncompliance, lack of communication and documentation, and QA/QC issues. You'll gain insights to help strengthen project oversight, improve documentation, and reduce professional liability exposure.

### SPEAKERS

**Diane P. Mika**, SVP, Risk Management Officer, Berkley DP  
**Anthony Andersen**, SVP, PL Claims Manager, Berkley Alliance Managers  
**Lisa McKay**, AVP, Sr. Claims Examiner, Berkley Alliance Managers  
**Liz Molina**, AVP, Sr. Claims Examiner, Berkley Alliance Managers  
**Mark A. Froehlich**, Esq., AVP, Sr. Claims Examiner, Berkley Alliance Managers



## Cyber Liability: Data Security for Design Professionals

Learning Units: 2.0 AIA CES LUs / 2.0 RCEP PDHs

Project data held by design professionals is valuable—and vulnerable. This webinar outlines cyber risks specific to architects and engineers. Learn strategies for securing networks, devices, and accounts, and risk mitigation best practices.

### SPEAKERS

**Jonathan Fairtlough**, Managing Director, Kroll  
**Alan Brill**, Senior Managing Director, Kroll  
**Andrew D. Mendelson**, FAIA, EVP, Chief Risk Management Officer, Berkley DP



## Dangerous Liaisons: Managing Potential Risks in the Construction Contract Administration Phase

Learning Units: 2.0 AIA CES LUs / 2.0 RCEP PDHs

Since most professional liability claims occur during the construction phase. Architects and engineers can strengthen their risk posture by recognizing potential hazards and managing services effectively throughout construction contract administration. This webinar examines common risks that arise during this critical phase and offers practical strategies—drawn from real project experience—to help avoid costly pitfalls. Each topic is illustrated with a case study to provide actionable insights.

### SPEAKERS

**James B. Atkins**, Atkins Consulting Solutions  
**Andrew D. Mendelson**, FAIA, EVP, Chief Risk Management Officer, Berkley DP



## Design-Build: Boom or Bust? Managing the Risks

Learning Units: 2.0 AIA CES LUs / 2.0 RCEP PDHs

In this on-demand webinar, experts in design, law, and business structuring explore the risks and rewards of Design-Build. The program exposes the critical differences between traditional delivery and Design-Build, equipping you with insights to navigate contractual, operational, and risk considerations effectively.

### SPEAKERS

**Mark C. Friedlander**, Partner at Schiff Hardin, LLP  
**Michael C. Bomba**, Director, General Counsel on the AIA Documents Team  
**Andrew D. Mendelson**, FAIA, EVP, Chief Risk Management Officer, Berkley DP



## Design-Build Public Infrastructure Projects: Risks and Challenges

Learning Units: 2.0 AIA CES LUs / 2.0 RCEP PDHs

Design-Build (DB) is increasingly popular as the delivery method of choice for many governmental entities for public infrastructure projects. Owners are attracted not only to the ability to contract on a fixed-price basis but also the opportunity to transfer substantial risk—which would traditionally be retained by the owner—to the design-builder. This webinar explores how DB procurement impacts professional risk and offers strategies for managing it.

### SPEAKERS

**Andrew D. Mendelson**, FAIA, EVP, Chief Risk Management Officer, Berkley DP  
**David J. Hatem**, PC Partner, Chair, Professional Practices Group





## Designing for Uncertainty: Resiliency, Climate Change, and Other 21st Century Perils

Learning Units: 2.0 AIA CES LUs / 2.0 RCEP PDHs  
HEALTH, SAFETY, AND WELFARE QUALIFIED

Design professionals face growing challenges—from climate change to aging infrastructure. This webinar explores resilient design strategies for buildings, infrastructure, and communities, using real-world case studies. Topics include extreme weather adaptation, post-COVID facility planning, HVAC, and best practices for inspections and structural assessments and best practices for performing adjacent structure-design, structural condition assessments, and other inspections.

### SPEAKERS

**Andrew D. Mendelson**, FAIA, EVP, Chief Risk Management Officer, Berkley DP  
**Diom N. Cominos**, Esq. Firmwide Managing Partner, Gordon & Rees Scully Mansukhani



## Developing a Risk Management Plan

Learning Units: 2.0 AIA CES LUs / 2.0 RCEP PDHs

Design firms face risk at every stage of a project. This webinar 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.

### SPEAKERS

**Andrew D. Mendelson**, FAIA, EVP, Chief Risk Management Officer, Berkley DP  
**Diane P. Mika**, SVP, Risk Management Officer, Berkley DP



## Digital Workforce: Strategies to Work, Collaborate & Lead Effectively Across Remote Teams

Learning Units: 2.0 AIA CES LUs / 2.0 RCEP PDHs

Mobile technology, ubiquitous connectivity, and shifting generational expectations have enabled and even compelled the transition from workplaces to workspaces. Operating in or leading a remote workforce and dispersed project teams requires a different set of tools to sustain relationships and maintain effectiveness. Learn tactics and acquire tools that design professionals can use to boost productivity, quality, communication, and influence in the digital age of work.

### SPEAKERS

**Ryan Jenkins**, Next Generation Speaker  
**Andrew D. Mendelson**, FAIA, EVP, Chief Risk Management Officer, Berkley DP



## Enhancing Design Firm Value through Profitability and Effective Business Management

Learning Units: 2.0 AIA CES LUs / 2.0 RCEP PDHs

Profitability at the project level is necessary for the overall financial success of the A/E firm. This webinar explores how strategic planning, financial management, and a performance-focused culture drive firm value. You will learn to use key financial metrics—both historical and predictive—to support profitable growth and informed decision-making.

### SPEAKERS

**Ian C. Rusk**, ASA, CM&AA, Managing Principal, ROG+Partners, LLC  
**Andrew D. Mendelson**, FAIA, EVP, Chief Risk Management Officer, Berkley DP



## Ethical Challenges & Enigmas for the A/E World

Learning Units: 2.0 AIA CES LUs / 2.0 RCEP PDHs  
HEALTH, SAFETY, AND WELFARE QUALIFIED

On paper, professional ethics seem simple—just do the right thing. But in the real world ethics can become very complicated for design and construction professionals competing for business and serving competing clients. Frequently, the “conscience clauses” of many new contracts only compound the challenges. This program draws on real life ethical cases from design professionals to illustrate the challenges and corresponding dilemmas. Based on those real world experiences, the program will chart a path to manage those challenges and clear the way for professional success, business stability, and expansion.

### SPEAKERS

**David A. Ericksen**, Esq., Executive Committee, Construction Practice Leader, Severson & Werson  
**Andrew D. Mendelson**, FAIA, EVP, Chief Risk Management Officer, Berkley DP



## Ethics for Engineers, Architects, and Other Design Professionals

Learning Units: 2.0 AIA CES LUs / 2.0 RCEP PDHs  
HEALTH, SAFETY, AND WELFARE QUALIFIED

Ethical behavior is integral to the practice of architecture and engineering, necessitated by the professional's duty to protect the health, safety, and welfare of the public. Making decisions and taking action can be complicated by ethical obligations imposed by multiple bodies: professional association codes of conduct, state practice acts, and licensing board requirements. Using professional association codes of conduct as a framework, this webinar offers a four-step process to make sound ethical decisions and explores real-life ethical cases to illustrate the challenges, dilemmas, and consequences of unethical behavior. In addition, you will take away six key strategies to avoid ethical problems.

### SPEAKERS

**Brian Sutter**, Esq., Managing Partner, Sugarman Law Firm  
**Stephen Davoli**, Esq., Partner, Sugarman Law Firm  
**Andrew D. Mendelson**, FAIA, EVP, Chief Risk Management Officer, Berkley DP



## From Scope Creep to Profitability

Learning Units: 2.0 AIA CES LUs / 2.0 RCEP PDHs

Change is inevitable, but scope creep doesn't have to be. This webinar 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.

### SPEAKERS

**Andrew D. Mendelson**, FAIA, EVP, Chief Risk Management Officer, Berkley DP  
**Diane P. Mika**, SVP, Risk Management Officer, Berkley DP



## Managing Project and Financial KPIs to Boost Firm Profitability

Learning Units: 1.5 AIA CES LUs / 1.5 RCEP PDHs

Project management isn't just about schedules—it's about performance and profitability. This session explores key performance indicators (KPIs), industry benchmarks from the Deltek Clarity A&E Report, and how firms can use data to improve project outcomes and financial success.

### SPEAKERS

**Andrew D. Mendelson**, FAIA, EVP, Chief Risk Management Officer, Berkley DP  
**Megan Miller**, Director, Product Marketing, Deltek



## Managing Risk through Effective Communication and Documentation

Learning Units: 1.75 AIA CES LUs / 1.75 RCEP PDHs

Clear communication and consistent documentation are essential to successful project delivery—and critical tools for managing risk. This webinar 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.

### SPEAKERS

**Diane P. Mika**, SVP, Risk Management Officer, Berkley DP  
**Andrew D. Mendelson**, FAIA, EVP, Chief Risk Management Officer, Berkley DP



## Managing Risk through Effective Contracts

Learning Units: 1.5 AIA CES LUs / 1.5 RCEP PDHs

Your professional services agreement is an essential tool in managing your exposure to risk. An equitable contract fairly apportions risk, while an onerous contract can shift inordinate—and sometimes uninsurable—liability to you. The terms and conditions of the agreement establish the roles and responsibilities of the parties, and the negotiation process provides an opportunity to set reasonable expectations with your client. This on-demand course reviews the risk management fundamentals that underlie the development of effective contracts, the contract review process, and key clauses that impact your risk exposure.

### SPEAKERS

**Andrew D. Mendelson**, FAIA, EVP, Chief Risk Management Officer, Berkley DP  
**Diane P. Mika**, SVP, Risk Management Officer, Berkley DP



## Managing the Legal and Practice Issues of BIM

Learning Units: 1.5 AIA CES LUs / 1.5 RCEP PDHs

Used properly, BIM can improve a design firm's productivity, quality, and project team relationships. Combined with Integrated Project Delivery, it can add value to the design and construction process through cost modeling and analysis, virtual building coordination, logistics and continuity, digital record documentation, and operations and maintenance. This course explores the benefits and practice considerations of implementing BIM, as well as the legal implications, including BIM's impact on the Standard of Care, controlling the use of your intellectual property, professional association tools and contract forms, and protecting your firm from professional liability risk.

### SPEAKER

**Andrew D. Mendelson**, FAIA, EVP, Chief Risk Management Officer, Berkley DP



## Navigating Challenges to Design Firm Growth and Expansion

Learning Units: 1.25 AIA CES LUs / 1.25 RCEP PDHs

A/E/C firms face multiple exposures to risk and growth by and their ability to manage multiple offices, coordinate a distributed workforce, streamline documentation, train new staff, and implement proper project delivery methods.

### SPEAKER

**Andrew D. Mendelson**, FAIA, EVP, Chief Risk Management Officer, Berkley DP



## Optimal Outcomes in Construction Contract Administration: Managing Risk During Construction

Learning Units: 2.0 AIA CES LUs / 2.0 RCEP PDHs

The basic purpose of Construction Contract Administration (CCA) is to determine whether the project is being built in conformance with the design intent. This course uses AIA documents to highlight the importance of providing CCA on all constructed projects, particularly as it relates to the Standard of Care and NCARB model law. Topics include site visits, substitutions, RFIs, change orders, and strategies to manage challenges and improve outcomes.

### SPEAKERS

**Andrew D. Mendelson**, FAIA, EVP, Chief Risk Management Officer, Berkley DP  
**James B. Atkins**, FAIA, President, Atkins Consulting Solutions



## P3: Myths and Realities for Design Professionals

Learning Units: 1.75 AIA CES LUs / 1.75 RCEP PDHs

Public-Private Partnerships (P3s) are expanding beyond roads and bridges to a wide range of public projects. P3 exists when a public entity retains a private entity to finance, design, and build a project that will deliver a benefit to the public. This course explains the legal and financial risks and rewards of P3 delivery, helping participants make informed decisions when pursuing or managing these complex opportunities.

### SPEAKERS

**Suzanne H. Harness**, Esq., AIA, Harness Law, PLLC  
**Andrew D. Mendelson**, FAIA, EVP, Chief Risk Management Officer, Berkley DP



## Project Risk Engineering for General Contractors

Learning Units: 1.25 AIA CES LUs / 1.25 RCEP PDHs

Architects and engineers are central to project success, and a structured approach to risk management is essential for delivering projects that meet client expectations and regulatory requirements. A comprehensive risk engineering process enables A&E teams to identify and mitigate risks throughout the entire project lifecycle—from concept and design development through construction administration and post-completion.

### SPEAKERS

**Timothy R. Brashear**, P.E., Officer, Vice President, Construction Services, Rimkus  
**Andrew D. Mendelson**, FAIA, EVP, Chief Risk Management Officer, Berkley DP



## Real-Life Ethical Situations in Design and Construction

Learning Units: 1.75 AIA CES LUs / 1.75 RCEP PDHs

As construction projects, project delivery, and owner expectations become increasingly complex, it is more important than ever for design professionals to make proper decisions based upon professional standards and codes of ethics. In this workshop, you will review the process of ethical decision making and gain a heightened awareness of ethical issues in day-to-day job functions through the exploration of actual cases and outcomes.

### SPEAKERS

**Mike Bilderbeck**, PE, FASHRAE, Picking  
**Jennifer Leach**, PE, LEED AP, BR+A  
**Kristin L. Schaefer**, P.E., Schaefer Engineering  
**Andrew D. Mendelson**, FAIA, EVP, Chief Risk Management Officer, Berkley DP



## Reviewing Contracts for Professional Liability Coverage and Risk

Learning Units: 1.75 AIA CES LUs/1.75 RCEP PDHs

Before signing on the dotted line, architects and engineers should carefully review contracts to ensure alignment with project-specific requirements, firm standards, and professional liability insurance (PLI) coverage. This webinar will illustrate the contract lifecycle, provide a comprehensive step-by-step review process, and present real-world examples of client-drafted agreement language. You will learn how to identify and amend contract language to enhance insurability.

### SPEAKER

**Diane P. Mika**, SVP, Risk Management Officer, Berkley DP



## Risk Management Essentials of the New Normal

Learning Units: 1.5 AIA CES LUs / 1.5 RCEP PDHs

In today's rapidly evolving AEC landscape, risk management fundamentals are more critical than ever. This course explores how post-pandemic shifts, emerging technologies, and changing client expectations are reshaping professional liability exposure for architects and engineers. Gain actionable insights and tools to protect your firm and enhance risk resilience in the "new normal."

### SPEAKERS

**Diane P. Mika**, SVP, Risk Management Officer, Berkley DP  
**Andrew D. Mendelson**, FAIA, EVP, Chief Risk Management Officer, Berkley DP





## The Prime/Subconsultant Team: Strategies for Coordinated Success

Learning Units: 2.0 AIA CES LUs / 2.0 RCEP PDHs

At the heart of almost every successful construction project is a well-structured and coordinated design team. By contrast, poor coordination leads to failure. This webinar presents an eight-step model for building effective teams, covering early subconsultant involvement, contracts, insurance, planning, communication, risk signs, and post-project reviews, with real-world examples of what works—and what doesn't.

### SPEAKERS

**David A. Ericksen**, Esq., Attorney at Law, Collins + Collins

**Andrew D. Mendelson**, FAIA, EVP, Chief Risk Management Officer, Berkley DP



## Trends in Geotechnical and Engineering Claims

Learning Units: 2.25 AIA CES LUs / 2.25 RCEP PDHs  
HEALTH, SAFETY, AND WELFARE QUALIFIED

Geotechnical engineering services are foundational to many design and construction projects. Architects and other engineering disciplines frequently rely on geotechnical reports in the performance of their services. This program gives insight to current trends in geotechnical engineering, related design and construction issues, and claims. Through real-life case examples involving serious failures and safety issues, you will learn how geotechnical reports and recommendations impact the integrity of the design and construction of a project.

### SPEAKERS

**M. Brandon Waddell**, Shareholder, Vincent Lopez Serafino Jenevein, PC

**Andrew D. Mendelson**, FAIA, EVP, Chief Risk Management Officer, Berkley DP



## Trends in Outsourcing Responsibilities to Architects & Engineers: Maximizing Opportunities and Minimizing Risk of Self-Certifications & Special Inspections

Learning Units: 1.75 AIA CES LUs / 1.75 RCEP PDHs  
HEALTH, SAFETY, AND WELFARE QUALIFIED

Faced with rising construction demands, many cities are outsourcing traditional government functions to design professionals. Architects and engineers are increasingly responsible for certifying plans, conducting special and façade inspections, and even verifying fire alarm corrections. While this outsourcing trend presents opportunities for new services and revenue streams for design professionals, the duty of care to protect the health, safety, and welfare through these services cannot be overlooked. The program covers three key areas: fire alarm certification, façade safety inspections, and special inspections.

### SPEAKERS

**Thomas M. Fleming II**, Esq., Partner, Milber Makris Plousadis & Seiden, LLP

**Patrick F. Palladino**, Esq., Partner, Milber Makris Plousadis & Seiden, LLP

**Jennifer M. Netska**, Esq., Associate, Milber Makris Plousadis & Seiden, LLP



## Understanding AIA Document A201™ - 2017 General Conditions of Construction Contract

Learning Units: 2.0 AIA CES LUs / 2.0 RCEP PDHs

This course offers a focused review of AIA Document A201-2017, highlighting key provisions design professionals need to know for effective construction contract administration. A201-2017 serves as a foundational document linking the owner's separate agreements with the architect and contractor. Understanding it can promote successful project outcomes, including satisfied owner expectations and minimized disputes.

### SPEAKERS

**Andrew D. Mendelson**, FAIA, EVP, Chief Risk Management Officer, Berkley DP

**Jeremy S. Baker**, Partner, Construction Law Group, Schiff Hardin LLP



## Understanding Your Contract: The Foundation for Successful Projects

Learning Units: 2.0 AIA CES LUs / 2.0 RCEP PDHs

Understanding the purpose and content of a professional services agreement is an essential skill in project management. 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 webinar provides an overview of risk management fundamentals, the contract review process, and the typical organization of the owner-design professional agreement.

### SPEAKERS

**Andrew D. Mendelson**, FAIA, EVP, Chief Risk Management Officer, Berkley DP

**Diane P. Mika**, SVP, Risk Management Officer, Berkley DP



## What You Need to Know about Construction Manager as Constructor (CMc)

Learning Units: 2.0 AIA CES LUs / 2.0 RCEP PDHs

Construction Manager as Constructor (CMc), often known in the form of Construction Manager at Risk (CMAR), is an increasingly popular construction delivery method, particularly for large and complex projects with enhanced schedule, and project cost demands. No longer limited to private sector projects, CMc delivery is often utilized for public works building projects where the concurrent input of construction and design professionals can promote positive project outcomes. Learn from an experienced owner's representative and design practitioners about key practical and contractual relationships, roles, and responsibilities in order to develop strategies to properly allocate and manage risks to achieve successful projects for the benefit of all project participants, building inhabitants, and the general public.

### SPEAKERS

**Arlen Solocheck**, FAIA, Consulting Architect

**Andrew D. Mendelson**, FAIA, EVP, Chief Risk Management Officer, Berkley DP

# BDP Risk® Learning Management System

BDP Risk® provides 24/7 online access to practical, relevant, and concise content from selected subject matter experts, designed to help you avoid professional liability claims, improve management practices, enhance business performance, and earn risk management education credit. \* [bdprisk.com](http://bdprisk.com)

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SUPPORT

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OF COMPLETION

ON-DEMAND  
LEARNING

MOBILE  
APP

CONTRACT  
REVIEW  
RESOURCES

The screenshot displays the BDP Risk Learning Management System dashboard. At the top, there is a navigation bar with the BDP Risk logo, a search bar, and user profile icons. The main content area is divided into several sections:

- Welcome to BDP Risk:** Features the Berkley Design Professional logo, a series of award medals, and a brief description of the LMS.
- News and Industry Events:** A section for staying updated on industry news.
- Help & Support:** Provides contact information for support.
- Registered Education Provider:** Displays accreditation logos for AIA and RCEP.
- Latest Additions:** A section titled "LATEST ADDITIONS" featuring a large image of a clock face and a list of new content items, including "Controlling Outcomes and Preserving Relationships...", "Cautionary Words in Contracts, Documentation, and...", "The Importance of Shop Drawings in the Design...", "Connectable: How to Strengthen Team Connection...", "Don't Swallow the Poison Pill", and "What Should You Do When a Client Wants to Cut...".
- Certificates of Completion:** A section titled "Certificates of Completion" with a large image of a diploma and a link to "Transcript and Certificates of Completion".
- Knowledge Library:** A section titled "KNOWLEDGE LIBRARY" with a large image of books and a link to "Browse through all Channels".
- On-Demand Learning:** A section titled "COURSES & LEARNING PLANS" with a large image of a hand holding a smartphone and a link to "Learning Plans and On-Demand Course Catalog".
- Mobile App:** A section titled "MOBILE APP" with a large image of a smartphone displaying the app interface and a link to "Instructions for Accessing BDP Risk via Mobile Device".
- Contract Review Resources:** A section titled "CONTRACT REVIEW RESOURCES" with a large image of a magnifying glass over a document and a link to "Contract Review Guide - 13th Edition".
- Quick Access:** A section titled "Quick Access" with a large image of a globe and a link to "News and Industry Events".



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## **BDP Risk® Learning Management System**

**B**DP Risk® has won seven coveted Brandon Hall Group Excellence Awards. These include learning

and development awards for “Best Advance in Custom Content,” “Best Advance in Creating an Extended Enterprise Learning Program,” and “Best Customer Training Program,” all of which recognize Berkley DP’s significant efforts and successes in developing resources to help our clients enhance business performance and mitigate risk.

## **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](http://berkleydp.com)

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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.*

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*\* 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.*