

Professional Liability Workshops for Architects and Engineers

THE WORKSHOPS BELOW CAN HELP YOU:

- REDUCE THE COST OF LOSS
- PREVENT PROFESSIONAL LIABILITY CLAIMS
- IMPROVE YOUR RISK MANAGEMENT PRACTICES
- EARN CONTINUING EDUCATION UNITS*
- REDUCE YOUR INSURANCE PREMIUM BY UP TO 10%

In conjunction with your agent or broker, the Design Professional group of the XL Insurance companies offers a number of effective loss prevention and practice management workshops—exclusively to policyholders. Based on years of claims experience, these workshops help you understand where the risks lie and give you real-world tools and techniques to help your firm address these risks. These XL Insurance workshops provide the additional benefit of continuing education units that can help you meet your license requirements.* For more information on workshop availability and enrollment, contact your XL Insurance agent or broker. If you're not a policyholder and would like to learn more about the XL Insurance program for design professionals, visit our website at www.xldp.com.

WORKSHOP NAME	Risk Drivers: Understanding the Dynamics of Risk in the A/E Industry	Client Selection: The First Step in Sound Risk Management	Contract Management: Risk Allocation by Design
WORKSHOP OVERVIEW	This seminar looks at how economic trends impact the design professions; explores how understanding your clients' needs can improve your firm's quality; demonstrates how the A/E and professional liability industries interrelate; and reveals the technical and non-technical causes of claims.	In this interactive workshop, you'll review the Risk Drivers research that identifies poor "Client Selection" as one of the top four causes of loss; acquire tools to create sound strategies for client review and intake; learn to understand and manage client expectations; and develop an action plan for your firm.	Based on XL's Risk Drivers research, this workshop demonstrates how poor project evaluation/selection, scope of services problems and breakdowns in contract protocols can lead to disputes and claims. You'll acquire tools and tactics to address these issues, review key contract clauses and develop an action plan for your firm.
REQUIRED WORKSHOP PARTICIPANTS	The seminar must be attended by more than 50% of the firm's principals, partners, executives and contract officers, plus more than 50% of the firm's project managers, professional staff and technical personnel that have project responsibility or client contact.	The workshop must be attended by more than 50% of the firm's principals, partners, executives and contract officers, plus more than 50% of the firm's project managers, professional staff and technical personnel that have project responsibility or client contact.	The workshop must be attended by more than 50% of the firm's principals, partners, executives and contract officers; attendance by other professional staff and technical personnel is encouraged but not required.
CONTINUING EDUCATION CREDITS*	2 Professional Development Hours (PDHs) 2 AIA/CES Learning Units (LUs)	2 PDHs 2 AIA/CES LUs	2 PDHs 2 AIA/CES LUs Health, Safety and Welfare (HSW) Qualified
MATERIALS	Handouts are not provided at this seminar.	Each participant receives a <i>Client Selection: The First Step in Sound Risk Management</i> handbook, which contains all of the tools and strategies from the workshop, along with an action plan.	Each participant receives a <i>Contract Management: Risk Allocation by Design</i> handbook, which contains all of the tools, strategies and recommended contract language from the workshop, along with an action plan.
COMPLETION REQUIREMENTS	Firms that have already completed the core Professional Liability Education Program (PLEP) courses and have met the attendance requirements noted above are eligible for an education premium credit.	Within 30 days of the workshop, the firm must complete and submit an Action Plan and a Seminar Data Sheet (which will be provided by your agent or broker).	Within 30 days of the workshop, the firm must complete and submit an Action Plan and a Seminar Data Sheet (which will be provided by your agent or broker).

Eligibility for Premium Credit: To participate in an elective workshop and receive premium credit, a firm must have already completed the core courses "Liability IQ" and "Contract Review and Revision I: Contract Basics." With that prerequisite met, a firm that successfully completes an elective workshop's requirements can earn a 10% credit on premium for the first \$5 million in coverage. Only one education premium credit per policy year can be granted.

Premium Credit Due Date Requirements: Firms must complete and submit the necessary forms and paperwork within 30 days of the workshop. In addition, the completed materials must be received by the Design Professional group of the XL Insurance companies within the first six months of the firm's current policy. Materials received after that date may qualify for a premium credit upon the next policy renewal.

***Continuing Education Credits Notice:** These Workshops are registered with the national AIA, and units earned by architects are directly reported to the AIA by the Design Professional group of the XL Insurance companies. Engineers may use certificates of completion to self-report learning units. Not all states and licensing boards accept these workshops for learning units.



Professional Liability Workshops for Architects and Engineers (cont.)

WORKSHOP NAME	Negotiations: Strategies for Better Client Agreements	Project Team Capabilities: Building a Team for Success	Time Management and Project Initiation: Tools and Tactics for Enhancing Project Management	Case Study Workshops
WORKSHOP OVERVIEW	Focused on the negotiation of professional services agreements, this workshop will help you understand your own negotiation style. You'll also learn the four basic skills of good negotiators, the importance of preparation and how to develop and implement successful negotiation strategies. You'll also develop an action plan for your firm.	In this practical and interactive workshop, you'll learn how project team capabilities can impact claims and how to successfully choose projects based on your team's capabilities. You'll acquire tools and techniques to help you select the best project manager and team members for your projects and you'll gain an understanding of the phases of team development. Finally, you'll develop an action plan for your firm.	This interactive workshop demonstrates the importance of effective time management and project initiation. You'll learn how improvements in these areas can impact your firm's profitability, and you'll acquire tools and tactics to successfully evaluate and manage your time and the project kick-off process. You'll also create an individual action plan and one for your firm.	There are 20 different XL Insurance "Case Study Workshops" based on actual claims. The workshops showcase a variety of disciplines and project types. You'll learn to identify areas of risk, use loss prevention techniques and decrease exposure to claims. <i>Contact your agent or broker to select the specific case study that meets your firm's needs.</i>
REQUIRED WORKSHOP PARTICIPANTS	This workshop must be attended by more than 50% of the firm's principals, partners, executives and contract officers; attendance for other professional staff and technical personnel is encouraged but not required.	The workshop must be attended by more than 50% of the firm's principals, partners, executives and contract officers, plus more than 50% of the firm's project managers. Attendance for other professional staff and technical personnel is encouraged but not required.	The workshop must be attended by more than 50% of the firm's principals, partners, executives and contract officers, plus more than 50% of the firm's project managers. Attendance for other professional staff and technical personnel is encouraged but not required.	The workshop must be attended by more than 50% of the firm's principals, partners, executives and contract officers, plus more than 50% of the firm's project managers, professional staff and technical personnel that have project responsibility or client contact.
CONTINUING EDUCATION CREDITS*	2 PDHs 2 AIA/CES LUs	2 PDHs 2 AIA/CES LUs	2 PDHs 2 AIA/CES LUs	2 PDHs 2 AIA/CES LUs (Some workshops are HSW qualified, and some are longer than two hours.)
MATERIALS	Each participant receives a <i>Negotiations: Strategies for Better Client Agreements</i> handbook, which contains all the material, tools and strategies presented in the workshop, along with an action plan.	Each participant receives a <i>Project Team Capabilities: Building a Team for Success</i> handbook, which contains all the material, tools and strategies presented in the workshop, along with an action plan.	Each participant receives a <i>Time Management and Project Initiation</i> handbook, which contains all the material, tools and strategies presented in the workshop, along with personal and firm action plans.	Each participant receives a <i>Case Study Workshop</i> booklet, which contains the facts of the case, worksheets, key points, results and an action plan.
COMPLETION REQUIREMENTS	Within 30 days of the workshop, the firm must complete and submit an Action Plan and a Seminar Data Sheet (which will be provided by your agent or broker).	Within 30 days of the workshop, the firm must complete and submit an Action Plan and a Seminar Data Sheet (which will be provided by your agent or broker).	Within 30 days of the workshop, the firm must complete and submit an Action Plan and a Seminar Data Sheet (which will be provided by your agent or broker).	Within 30 days of the workshop, the firm must complete and submit an Action Plan and a Seminar Data Sheet (which will be provided by your agent or broker).

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