

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 XL Insurance 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. 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 and Management	Contract Management: Risk Allocation by Design	NEW! Managing Construction Phase Risks: When Your Design Becomes Reality
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 and acquire tools to create a sound client review and intake process. You'll receive special tips for working with public clients and low-bid contractors. And you'll learn to understand and manage client expectations.	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. You'll also explore several critical contract areas and have the opportunity to revise onerous clauses.	In this workshop, you'll gain an appreciation of the importance of providing construction contract administration (CA) services, discover how firm slip up during the CA phase and make themselves vulnerable to claims, and acquire "best practices" to help manage such risks. You'll also learn to identify the early warning signs of a claim and what to do in response.
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 staff 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.
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	2 PDHs 2 AIA/CES LUs 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.	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.	Each participant receives a <i>Managing Construction Phase Risks</i> handbook, which contains the tools presented in the workshop.
COMPLETION REQUIREMENTS	Within 30 days of the workshop, the firm must complete and submit a Seminar Data Sheet.	Within 30 days of the workshop, the firm must complete and submit a Seminar Data Sheet.	Within 30 days of the workshop, the firm must complete and submit a Seminar Data Sheet.	Within 30 days of the workshop, the firm must complete and submit a Seminar Data Sheet.

Premium Credit: Each year, firms that successfully complete an approved program can earn up to 10% credit on premium for the first \$5 million in coverage.

Program Order and Repetition: Your firm may take these workshops or other education courses in any order. In addition, programs may be repeated after three years for premium credit (Note: for repeat continuing education credits, there must be three full calendar years between completions).

Due Date Requirement: Firms must complete and submit the necessary forms and paperwork within 30 days of the workshop; materials must also be received by the Design Professional group of XL Insurance 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 XL Insurance. Engineers may use certificates of completion to self-report learning units. Not all states and licensing boards accept these workshops for learning units, and some do not recognize the HSW qualification.

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.	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.	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.	There are 22 different XL Insurance "Case Study Workshops," which 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 staff 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 staff 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 staff 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.	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.	Each participant receives a <i>Time Management and Project Initiation</i> handbook, which contains all the material, tools and strategies presented in the workshop.	Each participant receives a <i>Case Study Workshop</i> booklet, which contains the facts of the case, worksheets, key points, and outcome.
COMPLETION REQUIREMENTS	Within 30 days of the workshop, the firm must complete and submit a Seminar Data Sheet.	Within 30 days of the workshop, the firm must complete and submit a Seminar Data Sheet.	Within 30 days of the workshop, the firm must complete and submit a Seminar Data Sheet.	Within 30 days of the workshop, the firm must complete and submit a Seminar Data Sheet.

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The information contained herein is intended for informational purposes only and does not constitute legal advice. For legal advice, seek the services of a competent attorney. Any descriptions of insurance provisions are general overviews only.

XL Insurance is the global brand used by XL Group plc's (NYSE: XL) insurance companies. Coverages underwritten by Greenwich Insurance Company, Indian Harbor Insurance Company, XL Specialty Insurance Company, and XL Insurance Company Limited—Canadian Branch. Coverages not available in all jurisdictions. Information accurate as of April, 2009.