

Willis A&E 2018 Webinar Program Descriptions

January 8th

Emerging Contractual Issues

We will be kicking off the new-year with a focus on emerging contractual issues. David Ericksen from the law firm Severson & Werson will lead a discussion on emerging contractual and legal issues facing the design community based on both 100s of negotiated agreements and litigation trends. Topics will include: Intellectual Property, Confidentiality, Fiduciary Liability, Limitations of Liability, Waivers of Consequential Damages, Indemnities, Mediations vs Arbitration, etc.! David will also address assessing vicarious exposures, authority to execute agreements, and contradicting terms and conditions. David will share his real-life experiences and specific recommendations as to solutions in contract and performance.

♥ February 14th

Valentine Special: "See Dick Build Watch Jane Sue"

A discussion on Go/No-Go Project Evaluation

Don't miss our annual Willis A&E Valentine special: See Dick Build Watch Jane Sue! Every year we consider the important "Go/No-Go" decisions every design firm must make when evaluating a new project opportunity. This year we will be joined by Chuck Craycraft, P.E., Vice President of Risk Management of Lochner, a leading national civil firm based in Chicago. Chuck will share his thoughts on how he evaluates and considers the risks associated with new business opportunities that can have a significant impact on a Design Firm's bottom line. Issues to consider and to be discussed include evaluating the project type, project team, financials, contracts and the client.

March 12th

From Scope Creep to Profitability

A well-defined scope of service is critical for any design professional. What specific services will your firm be providing; what additional services might you provide – and what services won't you be providing needs to be defined in contract and then managed as the project is implemented. Our special guest, Andrew Mendelson, FAIA Risk Management Officer for Berkley DP, will lead a discussion on the topic of managing change and your scope of services and specifically the control of resources to meet a certain objective by a specific date within a finite budget. Scope creep happens when there is an expansion of services provided without a corresponding increase in the design professional's fees, invariably resulting in disappointing financial results for the design professional. In our complex world of design and construction projects, change is inevitable, but scope creep is not. This workshop will help you learn the triggers for change and how to manage the change process – and mitigate your firm's risk!

April 9th

Lessons in Liability

This is an excellent program for all levels of staff as we will be delivering a crash course on the critical risk management issues challenging every A&E firm. Dan Buelow, Managing Director of Willis A&E, will lead a lively panel discussion on a wide range of issues including the standard of care, managing expectations, effective communication, documentation, construction administration etc.! etc.!. We will review some actual claims to help illustrate not only what can go wrong – but also those best practices every staff member should be aware of in order to mitigate the likelihood of a costly claim or client dispute.

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May 14th

[Seven Steps to Effective Project Management](#)

Learn the sequential eight-step model for successful creation and management of prime / sub-consultant relationships and the specific strategies and templates for each step. Discover traditional concerns of both primes and sub-consultants. Explore principles of vicarious liability and joint and several liability sources of claims and controversy. David Ericken from the law firm Severson & Werson will join us again to examine these issues along with a review of how better relationships and coordination can result in efficiency and quality in project delivery.

June 11th

[Claim Stories Around The Campfire](#)

Summer is here and it's time to gather around the campfire and tell some scary claim stories. Join us as we share some claim stories and have an interactive discussion on claim trends and specific risk management tips firm's should consider in order to mitigate their risk from costly claims and client disputes. Dan Buelow, Managing Director of Willis A&E will moderate a discussion between two crusty seasoned A&E claims experts: Bob Stanton, VP of Claim for Willis A&E and Anthony Carolei, VP of A&E Claims for Hanover Insurance Company. Both Bob and Anthony will share some of their favorite claim stories and participate in a lively panel discussion on some of the valuable lessons learned that every A&E firm can benefit from.

July 9th

[Alternative Delivery](#)

David Hatem from the law firm Donovan Hatem LLP will return for an in depth review of the evolving and complex risk management considerations of alternative delivery. David will review the background and reasons for the growing interest in D-B and P3 delivery methods as well as the professional liability risk exposures. This program will break down these PL related risk exposures for project participants in D-B and P3 and consider the contractual terms impacting/influencing PL risk exposure in D-B and P3. We will also review important insurance considerations including Professional Liability insurance solutions for D-B and P3 projects.

August 13th

[BIM and Electronic Transfer of Data](#)

Join us for a panel discussion on the evolving risks associated with BIM and important risk management considerations for the design firm. This will be an interactive review of the practice implications, quality management standards, processes and protocols, and professional staff behavior. Gain important information about the legal implications of using BIM, including its impact on the Standard of Care; changing ways to control the use of your intellectual property; professional association tools and contract forms to manage BIM; and mitigating your firm's risk.

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September 10th

Ethics for Architects and Engineers

What are the ethical obligations of the Design Professional when it comes to the health, safety and welfare of the general public? Jeff Coleman from Coleman Law will be presenting his special program to address this very question. What are the potential risks and liabilities to the Design Professional surrounding accessibility, energy efficiency, issues relative to conflicts between existing codes and client requests? What steps should you take in the event an error or omission is discovered? This promises to be a lively discussion on these questions as well as rules and regulations governing the architecture practice – and the ethical often complex issues Design firms.

October 29th

Halloween Special: Contracts from Hell!

Join us for our Willis A&E annual Halloween webinar special: Contracts From Hell! We will be taking another look back at some of the scariest contract clauses our A&E clients have been spooked with over the last year. This on-line program promises to prepare you for that next horrifying contract as we discuss some practical tips on how to negotiate fair and insurable professional agreements. Dan Buelow, Managing Director of Willis A&E, will moderate a discussion on how best to recognize and negotiate these spooky contractual risks with the help of two scary dudes: Bob Stanton, VP President of Claim for Willis A&E and Doug Palandech, from the law firm Foran Glennon Palandech. This is a fun program for all staff.

November 12th

Reducing Risk through Effective Documentation

We will be discussing possibly the most critical and often neglected area of risk management within the Design practice: effective communication and documentation. Most claims against A&E firms are due to unmet expectations. Most claims against A&E firms are not rooted in design error but rather in non-technical causes of loss – of which poor communications and documentation is a leading factor. This program will review the challenges and exposures associated with poor communication and documentation within the design and construction practice and offer practical advice on how everyone in your firm can manage risk.

December 10th

Construction Administration as a Risk Management Tool

This popular program will review the pitfalls and opportunities design firms face when it comes to construction administration. For this special program we will have an interactive discussion on issues relative to site visits, duties and the inherent risks. Addressing to non-compliant work, reduction and elimination of your role, scope creep and handling requests to terminate contractors as well reduced or terminated site visit responsibilities. We will discuss the standard of care and review some actual claim case studies and lessons learned specific to CA.

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