

CONTINUING EDUCATION

CURRICULUM GUIDE

GEOTECHNICAL ENGINEERS EDITION



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OVERVIEW

Victor Risk Advisory

Victor Risk Advisory includes our comprehensive continuing education program. The e-learning education component provides accredited coursework on risk management topics for geotechnical engineering (geotech) practices of all sizes. Course completion certificates will be issued. Geotechs should check with their state regulatory boards as to whether courses can be used to meet continuing education requirements.

A description of the courses most applicable to geotechs can be found on the next pages. These courses are part of our “Geotechnical Engineers Curriculum.”

What it does for you



Firms spend considerable time, money, and resources defending and managing claims. Firms can reduce these costs and mitigate their risks with Victor Risk Advisory. It was created in response to requests from our insureds that embedding stronger risk management practices into firm culture is challenging. Victor Risk Advisory responds to this need with a solution that helps to:

- Reduce the cost and effort of providing risk management training to employees
- Expedite onboarding/training for new employees
- Offer on-demand educational platform
- Support employees' needs to optimize tracking and reporting of CE credits
- Avoid and mitigate liability claims
- Improve project efficiency, performance, and client satisfaction
- Maintain a strong financial outlook by managing emerging business risks
- Optimize strategic planning with sound risk management protocols
- Protect reputation and brand
- Embed risk management culture into firm practices that will lead to fewer claims and long-term premium stability

Additional resources



- **Subject-specific articles on managing your project:** Browse dozens of articles about specific topics to help effectively manage project delivery.
- **Subject-specific articles on running your firm:** Browse dozens of articles about specific topics to help effectively manage the day-to-day operations of a professional firm.

Sign up today

Go to www.victorinsurance.com/us/login.html to start taking advantage of this critical firm resource. Visit www.victorinsurance.com/us/policyholders/victor-risk-advisory.html to login and start learning.

GEOTECHNICAL ENGINEERS CURRICULUM: 17 COURSES

Fundamental courses

Bidding or negotiation phase risk management

This course will provide design professionals with useful tips and best practices to use during the bidding and negotiation phase. This phase involves assisting the owner throughout the process, from obtaining bids all the way through helping the owner and owner's legal counsel with awarding the construction contract.

Concepts in risk management

This course is the foundation for all risk management learning. Design professionals will learn the basics of identifying project risks and important ways to manage those risks to minimize unfavorable outcomes. Learn about the sources of project risk and gain a better understanding of strategic options in risk management.

Construction phase risk management

This course discusses the contractual language and procedures used during the construction phase so that design professionals can manage the risks to the public, the client, and their firms by providing an appropriate level of service at an appropriate level of compensation. The course focuses on the role of the design professional in reviewing submittals, assessing substitution requests, responding to requests for information during the construction process, and evaluating construction quality.

Developing the capacity to manage risk

Managing risk in a design firm requires a commitment to best practices. This course will help design firms honestly assess their current capacity for managing risk and assist firms in developing important best practices and implementing robust capabilities for successful future practice.

Evaluation of projects and clients

Design firms must carefully evaluate whether a project is really the best fit from a risk management perspective. This means projects should be evaluated from a number of perspectives, including whether or not the design professional can effectively add value during the planning, design, and construction phases. Similarly, the design professional must



consider whether or not the project meets the firm's goals with respect to geographic location, project type, potential profitability, likelihood of disputes or problems, enhancement of reputation, and the prospect that the project will lead to future work. This course will support design firms in considering these implications.

Legal liability of design professionals

Professional liability consists of those obligations that are, or will be, legally enforceable and that arise out of the performance of, or failure to perform, professional services by the design professional. This course will provide an overview of the legal principles underlying professional liability and will help design professionals recognize the implications in practice.

Lessons learned: How case law informs prudent practice

This course will review cases involving a number of issues affecting the health, safety, and welfare of the public. Course content will discuss licensure issues faced by individuals and firms engaged in multi-state practice; how courts interpret and apply contracts on construction projects to protect the rights of project participants; and the insurance available to design professionals to protect owners and the public in the event of negligence on the part of a design professional.

Managing the claims process

This course will familiarize firms with the sequence of events in a typical claim. The speakers will provide advice on how best to assist in defending the claim or negotiating a settlement to minimize the impact of the claim on the firm, client, and public. Having this knowledge will help design firms obtain a greater sense of control and reduce the stress of a claim and its impact on the firm's professional life. Design professionals who have had lawsuits filed against their firms say they would have been less anxious if they had known more about what to expect during the claims handling process.

Planning phase and design phase risk management

Project planning begins with development of a clear, coherent definition of the project along with a plan for performing the scope of services provided for in the client-design professional agreement. This course addresses the design professional's contractual and functional responsibilities in performing planning and design services under the standard forms of agreement and emphasizes those activities critical to effective risk management.

Understanding the value of professional liability insurance

Professional liability (PL) policies are designed for a specific risk—the risk of loss caused by the negligent performance

of professional services. Design professionals and their clients need to understand the unique features of the PL policy and how to effectively transfer the risk of negligent performance when specifying PL insurance requirements. This course will explain “claims-made” coverage, the extent of contractual liability coverage, and how broad indemnity obligations challenge coverage, among other topics.

Intermediate courses

Alternative methods for project delivery

As market forces and technological innovations change design and construction, alternative methods of project delivery have become more popular. The traditional design-bid-build project delivery process includes procedures and legal requirements that are well-known. In this course, learn how the sequential approach to project delivery is being challenged by varying forms of construction management, program management, design-build, bridging, and integrated project delivery.

Contracts for professional services

Clear, concise contract terms substantially reduce the risk of business and financial disputes, as well as the risk of professional liability claims with clients. Contracts have long been recognized as essential risk management tools.

This course provides an overview of the types of contracts and project-specific and general contract terms commonly used in the procurement of professional services.

Design liability in a changing climate

Society faces rapid climate change and extreme weather events, and antiquated codes and standards do not adequately address the demands of climate volatility. This course can help design professionals understand their legal duty to meet an ever-changing standard of care while responding to climate change in a way that puts the security and well-being of users and the community above the immediate financial interests of the client to design to minimum standards. Design professionals must also understand the legal environment where foreseeability of harm and the duty to design to a higher standard of care may increase their professional liability exposure beyond their contractual liability exposure.

Dispute prevention and resolution

This course will focus on success in preventing disputes and mitigating those that cannot be prevented through appropriate action when a dispute occurs. Managing the risks and consequences of disputes affects the ability of project participants to put a capital asset in place. Disputes also risk delays, deficient design or construction, or project compromises that could impact public health and safety.

Managing the risks of various project delivery methods

Design firms must understand their role on a project and how it is essential to successfully manage their risks. The project delivery method, whether it is design/bid/build, design/build, public-private partnerships, or integrated project delivery, sets up the role of design firms and the relationships they have with other project stakeholders. This course examines different delivery methods, the typical roles design firms have in each setting, and how to successfully manage a client's expectations and the risks that the design professional may have.

Negotiating contracts with clients

This course examines the riskiest provisions design firms face in client-generated professional services agreements, focusing on onerous provisions that corrupt the standard of care, transform normally insurable professional services into uninsured contractual responsibilities, or create risk and cost-shifting obligations that exceed professional liability insurance coverage. Examples from Victor's experiences reviewing contracts for policyholders are compared to standard language in the AIA and EJCDC agreement forms and focus on the contractual intent and associated risks of many client-generated provisions.

Tailoring an insurance program for your firm needs

This course will discuss those insurance policies unrelated to professional liability coverage that are essential in helping a design firm successfully manage the risk of unforeseen events. It will also discuss the role of cyber and privacy policies that provide coverage for business liability for a data breach involving sensitive information. At a time when firms are increasingly sharing digital information, firms need to understand their responsibilities to safeguard sensitive information and how cyber policies play a key role in protecting both the public and the client from harm.

Helpful Links

- [Frequently asked questions](#)
- [Login to take courses](#)
- [Create an account](#)



ANTI-HARASSMENT COURSES: 9 COURSES



Anti-harassment courses are required by some state licensing boards and in many states by business practice laws. The courses listed below are individual and not part of a particular curriculum, but they can be completed and applied to certain state professional licenses or business practice requirements. They might also be applicable to requirements of an employment practices liability insurance program.

Anti-harassment for all employees: Illinois

This course, combined with your company's policies and commitment to combat all forms of workplace harassment, meets the training requirements for the state of Illinois.

Anti-harassment training for all employees: California

This course, combined with your company's policies and commitment to combat all forms of workplace harassment, meets the training requirements for the state of California.

Anti-harassment training for all employees: Connecticut

This course, combined with your company's policies and commitment to combat all forms of workplace harassment, meets the training requirements for the state of Connecticut.

Anti-harassment training for all employees: New York City and state

This course, combined with your firm's policies and commitment to combat all forms of workplace harassment, meets the training requirements for all of New York, including New York City.

Anti-harassment training for all employees: Non-state specific

This course, combined with your company's policies and commitment to combat all forms of harassment, will help foster an atmosphere of respect.

Anti-harassment training for supervisors and managers: California

If you are a manager in California this course includes specific references to California laws regarding sexual harassment training. This course is designed to be compliant with California standards.

Anti-harassment training for supervisors and managers: Connecticut

If you are a manager in Connecticut this course includes specific references to Connecticut laws regarding sexual harassment training. This course is designed to comply with Connecticut standards.

Anti-harassment training for supervisors and managers: New York City and state

If you are a manager in New York this course includes specific references to New York requirements regarding sexual harassment reporting. This course is designed to be compliant with New York standards.

Anti-harassment training for supervisors and managers: Non-state specific

This course is meant to be taken for general anti-harassment training and does not discuss the standards and/or regulations of any specific state.



ETHICS COURSES: 7 COURSES



Courses examining the ethical obligations of professionals are part of some state licensing requirements. The courses listed below are individual and not part of a particular curriculum, but they can be completed for credit like all other courses in Victor Risk Advisory and applied to various state professional licenses either to meet specific requirements or as part of general continuing education credits.

Ethical decision making for design and construction professionals

Designers, planners, architects, landscape architects, and engineers all need to know about and adhere to established codes of ethics. In this course, you will learn how to protect the public and the environment now as well as in the future.

Ethical decision making for engineers #1

This course examines the NSPE Code of Ethics. Design professionals will review cases ruled upon by the NSPE Board of Ethical Review, which will be key to helping determine how design professionals should act when faced with ethical decisions. The course explore each of the six NSPE fundamental canons.

Ethical decision making for engineers #2

Engineering is an important and learned profession. As a member of the engineering profession, professionals are expected to maintain the highest standards of honesty and integrity. To continue this effectiveness, the services that you as an engineer provide require honesty, impartiality, fairness, and equity, and must be dedicated to the protection of the public safety, health, and welfare. Engineers must adhere to a standard of professional behavior upholding the highest principles of ethical conduct. We call the standard of behavior “engineering ethics,” and embody it in the codes of ethics published by the state boards and by professional societies, such as NSPE.

In this second course, we will continue the direction of the NSPE Code of Ethics by looking at a few case studies and how the Code specifically applies in each case. We will look into a case involving the use of unlicensed software to create work products. We will review the concept of conflict of interest. Finally, we will discuss cases involving licensure and practicing in different states.

Ethics: Shades of green

This course will focus on how professional ethics are no longer black and white, they are shades of green. Not only do design professionals have an obligation to design for the health, welfare, and safety of the people they represent,

they also have an obligation to safeguard the environment. This course will discuss why design professionals have a green ethical obligation to promote excellence in design and endeavor to conserve and preserve the integrity and heritage of the natural and built environment. Discussion will focus on how professional societies and registration boards are holding design professionals accountable for sustainable design and planning practices and to consider the environment in everything they do.

Ethics for land surveyors: Decision-making in everyday practice

Examining the ethics of an individual’s actions, given a theoretical or “teaching” situation, is a standard method of appraising and judging professional practices. Many state boards of registration have promulgated either a “Code of Ethics” or a “Creed and Canons” with the intention of setting the bar for professional ethics. These guides are based on moral assumptions considered essential to our culture, and are the standards by which professionals are expected to make decisions, behave, and act.

This course examines seven situations that surveyors may commonly face, and discusses correct actions in the context of what the National Society of Professional Surveyors (NSPS) calls its “Surveyor’s Creed and Canons.” This course reviews the basic ethics and conduct expected of surveyors in professional practice.

Ethics for the practicing engineer: Managing risks imposed on the public

All engineering designs and all operations of engineered systems expose the public to some risk. Engineers are ethically obligated to protect the public from unacceptable levels of risk, which raises the questions: How is risk defined and quantified? What levels of risk are acceptable? In this course, learn how to evaluate risks imposed on the public by engineers. Professionals will also learn ways to determine which risks are acceptable and which are unacceptable.

Ethics for the practicing engineer: Organizational issues

Organizational issues can affect the decisions made by engineers every day. This course focuses on issues facing engineers working in large organizations. Case studies of organization-induced problems (such as the two space shuttle failures, the Macondo blowout, the GM ignition switch case) will be used to help participants recognize when organizational problems might cause ethical issues for engineers.

PROFESSIONAL DEVELOPMENT COURSES: 100s OF COURSES

The offerings listed below* are available to bring educational and development opportunities to all employees of your firm. There are hundreds of courses available in a variety of professional development areas based on the topics below.

In addition to risk management, anti-harassment, and ethics courses, insureds also have access to a comprehensive professional development training program that can improve the effectiveness, engagement, and compliance of an entire workforce. There are hundreds of courses across the topics below.

Since new courses are added and older ones replaced regularly, insureds can see the current course listing after they've logged into the continuing education platform at www.victorinsurance.com/us/login.html.

Essential training topics

- Leadership
- Management
- Communication
- Business & finance
- Sales/business development
- Harassment prevention
- HR compliance
- Project management
- Workplace violence
- Microsoft office suite
- Customer service
- Health & wellness
- Cybersecurity

Firms can also improve efficiency with The AEC Success Training Program: Professional Development for AEC Professionals.

- How to become a top-notch industry leader
- How to communicate and present effectively
- Networking and relationship building
- Effective decision making
- Time management and billable hours
- Business development and sales
- Five steps to effective email management
- How to create a focused, productive and low stress career
- How to find and/or become a mentor
- Conflict resolution in the workplace
- Effective LinkedIn strategies
- Strategies for a successful client interview
- Time management
- Designing presentation visuals
- Improving organization and productivity
- Obtaining the right credentials in your career

* The professional development courses offered under the various topics listed above are offered by our continuing education partner, RedVector/Vector Solutions, Inc., and are not generated or sponsored by Victor. The views and opinions expressed within individual courses are those of RedVector/Vector Solutions, Inc. and do not reflect those of Victor Insurance Managers LLC. Completion of these courses does not apply to any insurance premium considerations or risk management credits.



About Victor

Victor Insurance Managers LLC is the world's largest managing general underwriter with locations in the US, Canada, UK, Netherlands, Germany, Italy, and Australia. It handles more than \$2.5 billion USD in premium on behalf of numerous insurance carriers, through a large network of more than 25,000 active insurance agents and brokers. With deep, specialized underwriting expertise, the company provides a wide range of insurance coverage – from specialty property and casualty and professional liability insurance to group and retiree benefits. Victor is committed to building on 60-plus years of experience to develop products that address risk in new and evolving areas. For more information, visit victorinsurance.com.

Visit us at **Victor Risk Advisory** to learn more.

This document is for illustrative purposes only and is not a contract. It is intended to provide a general overview of the program described. Please remember only the insurance policy can give actual terms, coverage, amounts, conditions and exclusions. Program availability and coverage are subject to individual underwriting criteria.

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