

CONTINUING EDUCATION

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# CURRICULUM GUIDE

## LAND SURVEYORS EDITION



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# OVERVIEW

## Victor Risk Advisory

Victor Risk Advisory is our comprehensive continuing education program. The e-learning education component provides accredited coursework on risk management topics for land surveyor practices of all sizes. Course completion certificates will be issued. Surveyors 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 surveyors can be found on the next page. These courses are part of our “Surveyors 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



In addition to the courses on the next page, we have other risk management resources available to land surveyor insureds:

- **[Staking Out Your Future: Victor's Guide to Managing Professional Liability Exposure](#)**: This resource looks at multiple factors Victor believes, based on claims studies, are crucial in assessing and developing appropriate responses to various sources of risk.
- **[Risk Mitigation Credit: Surveyors](#)**: Learn about the steps surveyors can take to institute risk management procedures into their daily practice and save money on deductible costs.
- **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](http://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](http://www.victorinsurance.com/us/policyholders/victor-risk-advisory.html) to login and start learning.

# SURVEYORS CURRICULUM: 11 COURSES

## Fundamental courses

### 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.

### Cyber liability

Design firms face an increased exposure to cyber risks and liability through an increased use and dependency on technology. Every firm should have digital protection protocols in place to minimize data breaches and manage those breaches when they occur. Firms can use this course to learn more about what they can do to get ahead of this issue and avoid the professional practice and overall business liability implications of this increasing digital threat.

### 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.

### Insurance for design professionals

Insurance is a risk-transfer mechanism that is designed to allow an insured, for a price and under certain conditions, to transfer certain types of risk to an insurer. Without insurance, few, if any, construction projects could be undertaken on a prudent and financially sound basis. In this course, learn how an integrated, comprehensive insurance program is an essential component of a sound risk management program. For design firms, this should include professional liability insurance to cover the firm's liability in the performance of professional services.



### **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.

### **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**

### **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 all parties involved on a project 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 claims process**

Professionals who have had lawsuits filed against them say they would have been less anxious if they had known more about what to expect during the claims handling process. This course will familiarize firms with the sequence of events in a typical claim, and provide advice on how best to assist in defending the claim. It will also provide advice on what not to do. Having this knowledge can help firms obtain a greater sense of control and reduce the stress of a claim and its impact on their professional practice.

### **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.



## The changing rules and continuing challenges of employment practices

Firms need to appreciate their most important assets—their employees—and understand the importance of proper hiring, management, and, when necessary, disciplining or firing a staff member. This course provides advice on how firms can cope with the challenges of reducing employment issues and avoiding employee claims. It addresses the current rules and latest case law that guide professional service firms in their treatment of employment conditions and practices. From the necessary changes to accommodate same-sex spouses to the chaos surrounding the state and federal differences on marijuana usage, how firms deal with employment practices is becoming increasingly complex.

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### Helpful Links



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



# 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](http://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](https://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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