



«field1» Prospective ACIG Member Timeline

As of Month Day, Year

Contractor's Name: «field1» Renewal Date: «field3»

Broker Name: «field2»

Broker Contact(s): «field4»

Timeline Owner: _____

**Target
Date** **Completion
Date**

Prequalification

<p>1. Submission of Initial Contact Sheet «field1» and/or «field2» completes the Initial Contact Sheet from the ACIG website and forwards it to Chelsea Tyrie at Chelsea.Tyrie@ACIG.com.</p>		
<p>2. Review Qualifications ACIG reviews the material to confirm «field1» meets the basic elements of a desirable Member.</p>		
<p>3. Clear Prospective Member with Existing Membership If «field1» meets the qualifications, ACIG will clear «field1» with the existing Membership group.</p>		
<p>4. Complete Membership Application and Underwriting Information Submission If no objection is received from the existing Members concerning «field1», «field1» and «field2» will be advised to complete a Membership Application, including the underwriting information requested in Exhibit A, and return the submission through the ACIG document portal.</p>		
<p>5. Review Prospective Member ACIG to research «field1» and its Principals for fit.</p>		
<p>6. Distribute Annual Report and Other Documents ACIG sends «field1» and «field2» the most current Annual Report, Quarterly Newsletter, Life-Saving Commitments Newsletters, and other recent White Papers.</p>		
<p>7. Develop Timeline Upon receiving a completed application, a Timeline will be developed and the Proforma/Proposal development process will begin.</p>		



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Interview and Proforma/Proposal Development

<p>8. ACIG CEO Visit (at «field1») ACIG’s CEO will visit with «field1» and «field2» and present an Overview of ACIG’s lines of coverage, programs, services, mission statement, core values, guiding principles, and timeline steps.</p>	T-120	
<p>9. Review Upcoming Meeting Participation ACIG to share the list of upcoming meetings, such as Annual Meeting, In-House Counsel Meeting, Safety/Claims Workshop, Builders Quality Summit and Autumn Risk Management Workshop. Discuss with «field1» and «field2» to create a list of prospective attendees.</p>	T-120	
<p>10. Schedule ACIG Initial Risk Assessment and Analysis (IRAA) ACIG safety and quality consultants will commence an IRAA to assist in underwriting evaluation and support preparation for the Boot Camp if «field1» becomes a Member.</p>	T-105	
<p>11. Schedule ACIG Risk Management Review ACIG General Counsel and Risk Management Executive will review «field1» operations, locations, companies/named insureds, risk processes, and notable claims in coordination with «field2».</p>	T-105	
<p>12. Develop Proforma ACIG will prepare a Proforma for «field1» including a comparison to «field1»’s existing insurance program.</p>	T-105	
<p>13. ACIG/Broker Proforma Review ACIG and «field2» will review Proforma together and clarify, correct, adjust, as necessary.</p>	T-105	
<p>14. Compare GL Coverage ACIG will work with «field2» to produce a General Liability coverage comparison between ACIG’s GL form and «field1»’s current GL policy.</p>	T-105	
<p>15. Third Party Administration ACIG Claims Vice President and «field2» will discuss workers’ compensation claims handling options, including in-house and TPA options.</p>	T-105	
<p>16. Review Standard Contract(s) ACIG, in coordination with «field2», will review and make recommendations for: <ul style="list-style-type: none"> a) Strengthening standard Subcontract forms, along with Professional Services Agreement(s), Rental/Lease Agreement(s), and Short Form Subcontracts, as applicable. b) Prime Contract form(s). </p>	T-105	



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<p>17. Prospective Member Orientation Meeting (at ACIG) «field2»'s and «field1»'s management teams will travel to ACIG's office to review the Proforma and meet with key ACIG personnel for an in-depth review of ACIG's service model.</p>	T-90	
<p>18. Decide to Move Ahead and Update Timeline At the Richardson meeting, if «field1» and ACIG agree to proceed ahead, the Timeline will be updated taking the process from a renewal submission into the decision making phase, commencing development of a formal Proposal. The updated Timeline is reviewed and approved by «field1» and «field2».</p>	T-90	
<p>19. Distribute ACIG Information Booklet The ACIG Information Booklet is provided to «field1» serving as the prospectus for offering common shares to prospective Members.</p>	T-80	
<p>20. Schedule CFO Financial Orientation By teleconference, ACIG's CFO, Brad Porter, will present a 3-hour financial orientation to «field1»'s CFO.</p>	T-80	
<p>21. Attend One of the ACIG Member Meetings «field1» and «field2» would attend the annual meetings of the ACIG Member group (Annual Meeting in February and/or Autumn Risk Management Workshop in October). Interaction with ACIG Members is helpful and encouraged.</p>	TBD on one of the 2 targeted meetings annually	
<p>22. Attend Safety/Claims Workshop and Builders Quality Summit Claims, Safety, and Quality representatives of «field1» would attend the annual Safety/Claims Workshop or Builders Quality Summit. This allows interaction with their safety, claims, and quality peers from the ACIG Member group.</p>	TBD on the targeted meeting annually	
<p>23. Deliver and Review Proposal ACIG will deliver the formal proposal at «field1»'s office or by video conference. Subsequent updates will be completed as needed.</p>	T-60	
<p>24. Review Information Booklet «field1» and «field2» complete their review of the Information Booklet with ACIG input on any questions identified.</p>	T-60	
<p>25. Make a Membership Decision «field1» will decide if they want to become a Member.</p>	T-50	
<p>26. Review Group Programs and Supplemental Lines Options «field1» and «field2» to review ancillary lines options with ACIG's Director of Risk Management.</p>	T-45	
<p>27. Attend Meet the Partners Meeting A meeting between «field1» and select Members of ACIG's Executive Committee will take place for mutual questions and answers. An invitation to join ACIG may be issued shortly thereafter.</p>	T-40	



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28. Provide Logo, Photos, and Hardhat/Tactical Hand-off «field1» to provide high-resolution logo, project photos, and hardhat for display in ACIG’s office and website. New ACIG contact will be provided to «field1» and «field2» to further coordinate tactical Membership items.	T-40	
29. ACIG Strategic, Tactical, and Early Onboarding Commences Knowledge transfer to entire service teams is completed and details of «field1»’s programs are disseminated as documented using the three checklists.	T-40	
30. Execute Subscription Documents / Purchase Stock / Subordinated Debenture After the invitation to join ACIG has been issued and accepted, the Member subscription documents are completed and sent back to ACIG along with checks for the stock and the subordinated debenture.	T-30	
31. Order to Bind Final Proposal Final proposal(s) to be bound via e-signature by «field1».	T-30	
32. Review Premium Accounting Processes ACIG, «field1», and «field2» will schedule a video conference to review and discuss exposure reporting, premium accounting, and timetable(s).	T-30	
33. Schedule Claims Orientation ACIG Claims staff will confirm details of claims communication and reporting structure, TPA selection, and SWAT protocol with «field1» and «field2».	T-30	
34. Issue Certificates of Insurance ACIG to coordinate with «field2» on issuance of Certificates of Insurance.	T-30	
35. Designation of Directors and Alternates «field1» will identify two Directors and two Alternates to sit on ACIG’s Board of Directors.	T-14	
36. Confirmation of Key Contacts Listing of «field1» and «field2» key contacts by service area will be formalized as will identification of «field1» personnel to be added to various operations initiatives, forums, task forces, peer groups, and performance excellence, as applicable.	T-7	

ACIG Program Commencement

ACIG Coverage Effective Date	«field3»	
37. Boot Camp Development Begins ACIG Team will coordinate and prepare Boot Camp materials, in collaboration with «field1» and «field2».	T+14	



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38. RMS, Claims, Safety, and Quality Benchmarking Surveys «field1» will complete each of the benchmarking surveys.	T+21	
39. ACIG State-side Policy Issuance ACIG will issue out all state-side policies to «field2» for their review, to be forwarded on to «field1».	T+30	
40. Contractual Risk Transfer Review	T+35	
41. Executive Check-in ACIG Executive Team to set a check-in call/visit with «field1» CEO, CFO, «field2», and other «field1» decision makers.	T+45	
42. Walk Through of First Quarterly Report At the end of the first quarter post-policy-inception, ACIG’s CFO and RME will review the report with the «field1»’s CFO and Controller and «field2», as applicable.	T+90	
43. Conduct Boot Camp «field1»’s Risk Management Boot Camp completed.	T+90	
44. Boot Camp Action Plan Formed ACIG will communicate the Minutes, Goals, Action Items, and Strategic Priorities by functional area to «field1» and «field2».	T+100	
45. Executive Check-in ACIG Executive Team to set a second check-in call/visit with «field1» CEO, CFO, «field2», and other «field1» decision makers.	T+225	