

Clarifying "Means and Methods" for Operations

Date: 03 MAR 2025

Version #: 02

DOC #: SFS-04

Owner: Jordan Hollingsworth

1. Purpose

The purpose of this job aid is to address challenges and clarify ambiguities related to the term “means and methods” as outlined in SMG’s contractual language. This job aid provides guidance on understanding responsibilities, liability, and how to frame advice appropriately.

2. SMG Contractual Language

"As a consultant, SMG shall not have control over or charge of or be responsible for the means, methods, techniques, sequences, or procedures, or for the safety precautions or programs in connection with the Client's work on the Project (or the Client's contractors or subcontractor's work) since these responsibilities always remain with the Client or the Client's contractors or subcontractors."

3. Definition

Means: The resources used to accomplish the work, such as labor, materials, and equipment.

Methods: The way in which the work is performed, including the techniques and strategies employed.

Together, "means and methods" refer to how the Client or their contractors execute the work practically, including:

- Planning work processes.
- Selecting equipment or materials.
- Establishing task sequences.
- Implementing safety measures.

4. Responsibilities

As a consultant, SMG is not responsible for:

- **Equipment or material selection:** Deciding tools or materials for tasks.
- **Work process planning:** Defining how tasks are performed.
- **Task sequencing:** Determining the order of task execution.
- **Safety implementation:** Establishing or enforcing safety programs.

These responsibilities lie solely with the Client or their contractors and subcontractors. SMG's role is to provide advice, designs, or specifications without directing the actual execution of the work.

5. Guidelines

SMG Associates can advise Clients while maintaining boundaries of liability by:

1. **Providing General Recommendations:** Present guidance as summaries of industry-recognized practices or standards (e.g., ANSI, IEEE):
Example: "ANSI/IEEE guidelines recommend these methods for stringing overhead transmission lines for safety and efficiency."
2. **Assisting with Risk Assessments:** Support the Client in evaluating project-specific risks for selecting suitable methods or tools.
3. **Collaborating on Solutions:** Suggest improvements or alternatives without prescribing specific methods:
Example: "Would you consider exploring [specific method]? It aligns with ANSI/IEEE standards for efficiency and safety."

6. Important Limitations

You cannot enforce the following:

- Verbal directives not included in AEP Supplemental Safety Terms and Conditions or related references.
- Outdated or internal AEP Safety Manuals.
- Outdated Supplemental Requirements.
- Specific work methods.
- Opinions based on personal experience without contractual documentation.

7. Frame Advice Properly

1. Use educational language emphasizing recommendations and industry consensus.
2. Avoid direct instructions or mandates.
3. Clarify that suggestions are based on standards, not enforceable directives.

Why Does This Matter?

By respecting these distinctions, SMG ensures:

- Clear boundaries of responsibility and liability.
- Supportive client relationships without overstepping contractual limits.
- Consistent adherence to SMG's consultant role.

By following these guidelines, you can provide effective, compliant guidance while reinforcing SMG's expertise and professionalism.