CHAPTER 2

ESTABLISHMENT ADMINISTRATION

(Sponsor: NAVY PEOPLE-WCM Hd)

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CHAPTER 2

ESTABLISHMENT ADMINISTRATION

References:

A. JSP 462 Financial Management Policy Manual (Chapters 5 and 7).
B. JSP 755 Tri-Service Positions and Assignments – Instructions.
C. RNTM 05-014-26 Navy Command Military Workforce Change Process.

0201. Introduction

The purpose of this Chapter of BRd 3(1) - Establishment Administration - is to give guidance and direction for maintaining and making changes to JPA Establishments (Ship, Unit, or other Organisation) containing Royal Navy workforce requirement elements.

Note. *For simplicity a ship, unit or other organisation will hereafter be referred to as a (JPA) Unit.*

0202. Governance

a. **Authority.**

(1) Establishments within the Ministry of Defence are authorised by the Permanent Under Secretary (PUS) who has delegated some complementing powers and responsibilities to the Principal Personnel Officers (PPOs) of the single Services. The Navy Command Workforce Change Management (WCM) team (previously known as the Establishments Team), under 2SL as the PPO, has responsibility for maintaining and implementing endorsed changes to all Royal Navy positions within the JPA Establishment. Delegation by the PPO allows WCM to create positions up to and including OF5 (Capt RN / Col RM).

(2) The policy and procedures here apply to Royal Navy positions within Navy Command and TLBs that employ RN personnel. Army and RAF positions in Royal Navy organisations are administered by the owning Service, not by the WCM team.

(3) Navy Command operates a partial delegated model. Therefore, some elements of this chapter are in the latest Navy Command Military Workforce Change Process RNTM. Each directorate has a Whole Force Management Group (WFMG) and Military People Partner that can aid any Establishment amends.

b. **Organisation.**

(1) **Senior Posts.** The PPO organisation is at Chapter 1.

(2) **Strategic Personnel Planning.** The responsibility for strategic personnel planning for the Royal Navy resides in the Policy Strategy & Plans (PSP) area of the People and Training Directorate (Dir P&T). In conjunction with Fin Mil Cap (FMC), sustainable plans are made to ensure that the right quantities and types of Royal Navy personnel are available to meet the authorised demand (Workforce Requirement, previously known as Liability). This long-term planning is covered in detail in Chapter 3.

(3) **Augmentation Crisis Personnel Planning.** People Ops Aug is the Dir P&T empowered authority for dealing with all Royal Navy augmentation requirements. Some of the augmentation demands for Royal Navy personnel will be authorised through the Defence Single Tasking Authority (DSTA) and are known as Above the Line (ATL) augmentation. Internal augmentation to the Royal Navy as part of the single Service force generation process are known as Below the Line (BTL) augmentation. Crisis Augmentation and Donor Positions are explained further below and in Chapter 59.

(4) **Profession Managers (PM).** Information on Profession Management is in Chapter 62. Profession Managers (formally known as Branch Managers) take a medium to long-term view to manage each Profession. They aim to enable the Profession to remain sustainable, both to ensure that personnel can be grown to meet demand and to ensure that individuals within the Profession have a coherent career structure. The PM (in liaison with Career and Talent Managers) has input to the acceptability (or not) of proposed changes to Establishments.

(5) **Career and Talent Managers (CTM).** Information on Career and Talent Management is at Chapters 58 to 61. The roles of the CTM include assigning personnel to meet current customer demand (as reflected in a unit's Establishment), as well as managing everyone's career.

(6) **Navy Command Workforce Change Management (WCM) Team.** The WCM Team (previously known as the Establishments Team) makes all authorised changes to Royal Navy positions (with the exception that PJHQ is authorised to make changes to ATL non-workforce requirement-driving augmentation positions) and processes all customer change requests that seek changes to the Establishment. It also deals with the Civil Service as a Whole Force team.

(7) **Military People Partners (MPP).** Each NC 2* WFMG will have a Military People Partner (MPP) to provide advice and guidance on military workforce change. They are there to assist sponsors in implementing strategic and tactical in year change and provide mitigation to structure and people delivery. Sponsors of all military change should seek these out at earliest opportunity on any proposed or planned change.

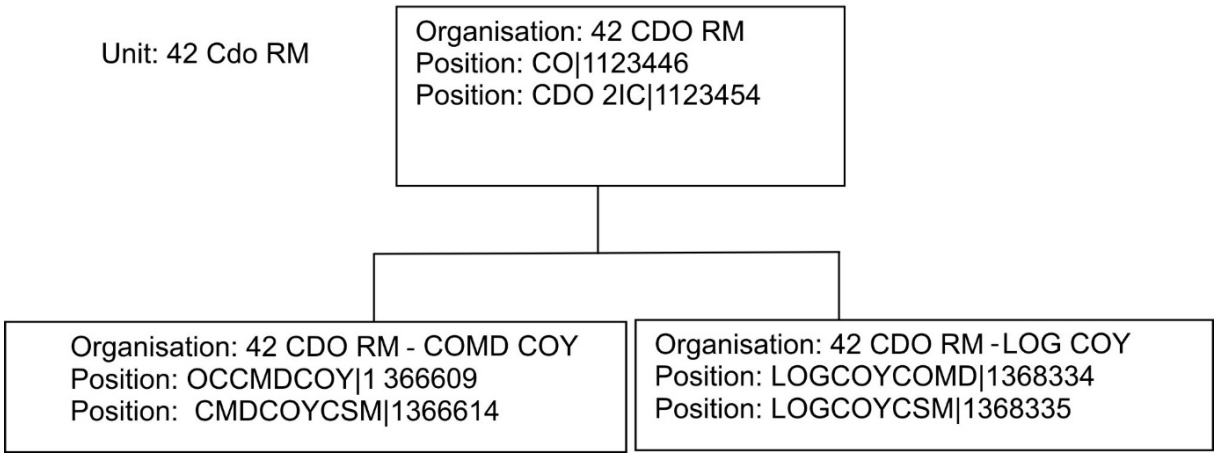
(8) **Unit Establishment Administrator (UEA).** The UEA has a key role in managing the position hierarchies for a unit. This role is explained further in Para 0203.d, JPA Organisations – Hierarchies and Workflows. Each 2* Directorate at a minimum will have a UEA, but most geographical establishments will also have a UEA.

(9) **Whole Force Management Groups (WFMG).** Each 2* directorate has a Whole Force Management Group (WFMG). The Whole Force Management Group construct is designed to facilitate the delivery of Whole Force change, particularly where change demands cannot be dealt with at unit level, support their Directorate in making informed strategic decisions in support of their workforce priorities and requirements, and support the delivery of Navy Command TLB objectives. WFMGs should be centrally involved in the 2* directorate Workforce Planning activity, screening any investments and disinvestments that include an annual workforce change coming from within the directorate before submission to Strat Plans. This is to be accomplished using the Annual Strategic Prioritisation and Balance of Investment round which feeds into the Strategic Planning Cycle (SPC). The Business Manager is critical in this, overseeing these processes and supporting the sponsor in completing business cases and necessary documents to enact workforce change. They are to oversee and solve short-term internal workforce needs and develop longer term requirements. They will operate within allocated resources and, as part of future savings measures, choose Compensating Reductions (CR) when directed. If a sponsor wishes to make a Major Change (Para 0204.c), the WFMG should be made aware and kept informed. If a sponsor wishes to make an Establishment change without a CR, then they first need to raise this with their WFMG, which will assist them in finding an internal CR if the requirement is approved. This is explained in the Navy Command Military Workforce Change Process RNTM.

0203. JPA Establishments

a. **Composition of a JPA Establishment.** An Establishment is comprised of several Organisations and Positions on JPA, as illustrated below:

Figure 2-1. An Establishment Comprising of Organisations and Positions



Notes:

1. It is common for the command Organisation to have the same title as the overall Unit.

2. Each Organisation can have only one UIN, but more than one Organisation can share a common UIN.

3. The figure shows only a few of the Organisations and Positions that make up a Unit.

b. **JPA Positions.**

(1) **Entitlement.** JPA is the single authorised data source showing an entitlement to Royal Navy personnel and it is the Position data within JPA that shows each Unit's entitlement for personnel. For those positions that count towards Workforce Requirement (WR), the entitlement is continuous while the position remains valid (if a position counts towards WR then it is considered for recruiting, training, and promotion targets). A baseline WR ceiling is agreed for each of the single Services against which Workforce Balance is measured (see Para 0302.d). For positions that do not count towards WR, the entitlement is active only for a specified purpose and period. It should be noted that, although there is an entitlement to specify personnel requirements, if there are any constraints on the supply of personnel then some posts will be gapped (common constraints are personnel being unavailable due to illness, being temporarily employed on an operational augmentation task or general personnel shortage in that branch or specialisation).

(2) **Enduring Position.** An Enduring Position is the standard position type. It represents a funded and enduring (permanent) demand for personnel of the type specified.

(3) **End Dated Position.** An End Dated Position represents an authorised demand for personnel until a specific date, when it eliminates (often with the WR and funding being utilised elsewhere). Any requests to extend this type of position will be treated as a request for a new position and will follow the change request rules. This rule applies as funding assumptions will not extend past the end date. Personnel Planners and Profession Managers will have planned on the basis of not having to provide personnel past the end date, with the WR and funding element likely to be planned and scored against a future role. Continuing to provide personnel to an end dated position could be at the expense of gapping an authorised position elsewhere.

(4) **Temporary Position.** A Temporary Position is created to meet a specific short-term high priority demand for personnel. It is created for a finite period between three months and one full assignment (usually 18-48 months). Temporary positions do not count towards WR and, consequently, do not drive recruiting and promotion targets. They can usually be filled only by gapping a WR driving post elsewhere. This is clearly undesirable, so therefore PM/CTM agreement via the formal carding process is required. The Temporary Position will normally be created from a Workforce Requirement Substitute (WRS) i.e. gapping another whole force position within its 2* WCE.

(5) **Rotational Position.** A Rotational Position is filled in turn by either two or all three Services with the Positions counting ½ towards Workforce Requirement in the bi-rotational case and $^{1}/_{3}$ where each Service is involved. Rotational Positions exist in Joint organisations, and they represent an authorised demand for Naval personnel for the rotation that the Royal Navy has agreed to fill the post. They can also exist in multinational organisations such as NATO and the rotation may be shared between more than one nation.

(6) **Competition Position.** A Competition Position does not belong to any Service and candidates 'compete' for selection. As with Rotational Positions, they predominantly exist in Joint organisations and follow the rotational rules for Workforce Requirement attribution. They represent an authorised demand for RN personnel for the period that the RN agrees to fill the post as part of the 'competition'.

(7) **Exchange Position.** There may be exchanges with other nations or Services. Exchange Positions are normally paired with one in each nation or Service, and only the 'exchange in' post from each pair counts towards Workforce Requirement.

(8) **Crisis Augmentation and Donor Positions.** Crisis Augmentation positions are activated only for a specific period and for a specific reason. Donor Positions are Enduring Positions that have been identified in advance as being suitable for providing personnel to fill the activated Crisis Positions. Some of these Donor Positions are designated as Dual Positions and in this case the incumbent is linked to a specific Crisis Position. As with all augmentation issues, People Ops (formerly ACMP/PCAP PLANS) staff has the lead. Mobilisation policy is covered in JSP 753 - Naval Force Generation, Augmentation and Crisis Management are expanded upon in Chapter 59.

(9) **Workforce and Resilience Training Margin (WRTM) and Untrained Strength (UTS) Pool Positions.** Within JPA there are many WRTM and UTS pool Positions that are used for assigning personnel who are temporarily unavailable for normal duties. For example, when an individual is medically downgraded, on a training course or on Post Operational Tour Leave. The PPO policy on WRTM and UTS Positions is to strike a balance between having sufficient to support customer business needs without Establishment administration becoming unwieldy. Therefore, the WCM Team will authorise the minimum necessary. Illustrative structures for margin activity organisations and positions are at Annex 2A.

It should be noted that MA10 Positions for Exercises [10A] or Events [10B] are created only as required for specific Exercises or Events. A more detailed explanation of WRTM Positions and how they are managed is at Part 3 Annex 3B. These are all within the Deputy PPO element of the delegated financial model and 2* Directorates are therefore not financially penalised for UTS/WRTM.

(10) **Compensating Reduction.** A Compensating Reduction (CR) is an enduring position that is offered for deletion to create a new enduring position within a TLB. The CR offered by the employing TLB, or agreed to be transferred from another TLB, will be deleted when the new position is created such that Workforce Requirement within the TLB remains in balance. CRs are to be offered at the same rank/rate and specialisation as that required for the new Position. The use of CRs of differing rank/rate and specialisation may be considered in exceptional circumstances if TLB funding and Branch structural sustainability allows via the normal carding process and early engagement via the appropriate MPP is recommended.

(11) **Workforce Requirement Substitution.** A Workforce Requirement Substitution (WRS) is an Enduring Position that is formally gapped within the employing TLB's Establishment, to create a Temporary Position of between three months and one full assignment. A WRS underpins the structural sustainability of the supplying branch and ensures Workforce Requirement within the TLB remains in balance. This has a key advantage in that it does not reset the clock on positional fill and is useful to pivot someone into a change of job specification to fulfil a higher priority task or project.

(12) **JPA Supplementary Positions.** With increases in Gains to Trained Strength (GTS), there is an enlarged requirement for additional non-workforce Requirement positions within seagoing units and air stations, solely for the purpose of pulling through SQEP. The introduction of SUPP positions is a direct replacement for the legacy Overborne Strength (OBS) and the policy detailed within Annex 2E will assist Branch Managers in delivering sustainable Branch structures. In addition, the policy clearly articulates the purpose of the SUPP position and provides CMs and unit staff with clear instructions to deliver the pull through of personnel.

c. **JPA Positions and Organisations.** JPA positions are tagged with the Position Category (sometimes referred to as the Role) in which they are to be filled. A position may have multiple categories. For a position to be active, it must have a category that matches the status of its parent Organisation and have a valid EIT status. For Shore Positions a blank EIT status should be treated as valid. The Organisation will only ever have one status active at any time (e.g. a ship under construction (crewed) will be in the 'Z' Role) and this will determine which of the positions within that Organisation require filling. Position Categories used by the Royal Navy are shown at Annex 2B.d.

d. **JPA Organisations - Hierarchies and Workflows.** When creating a JPA Organisation for the first time, or moving a JPA Organisation, the following JPA functions need to be set up:

(1) **Command and Administration Hierarchies.** The Command Hierarchy shows where a JPA Organisation features in the Chain of Command, whereas the Administration Hierarchy facilitates support functions for a Unit's personnel. The Command and Administration Hierarchies are set up by the Establishment Administrator. These Hierarchies are explained in more detail at Annex 2C.

(2) **Organisation Workflow Responsibilities.** Organisation Workflow Responsibilities are essential to the administrative functioning of an Organisation and should be set up by the UEA. Organisation workflows include those for the Unit Personnel Office (UPO), the medical facility, the UEA and the Commanding Officer. The latter workflow facilitates the organisation's appraisal process.

(3) **Position Hierarchy.** Position Hierarchy enables the movement of workflows between staff and their line managers for functions e.g. leave requests (Junior Rates only), job preferences and personal objectives (the latter two being critical parts of the appraisal process). The Position Hierarchy is set up solely by the UEA (although the Establishment Administrator can also do this), using data drawn from the Position Occupancy Report and Unit Position List for the organisation. Both these reports can be run by the UEA.

0204. Policy

a. The existence of a position in an Establishment is the Naval authority for the provision of personnel. Although employers have a major input in determining the demand for different types of personnel, these demands need to be reconciled with several factors which impinge on the overall structural sustainability of the Royal Navy. These factors include funding, structural impact, Workforce Requirement control, timing, and the need to meet the planned augmentation and force generation requirement. The PPO will apply the following tests before authorising an Establishment change.

b. **PPO Tests.** When considering changes to the Establishment, the PPO examines four key criteria prior to creating or making amendments to the JPA Establishment. All 2* WFMGs/sponsors should be aware that the four tests outlined below must be passed prior to the creation of temporary positions or changes to permanent Workforce Requirement positions within JPA. If the requirement is urgent then the process will be applied quickly and potentially at risk if the need is a 3* or 4* Urgent Operational task, but a failure either to obtain the necessary approval or apply the tests will result in rejection by the PPO and incur a delay:

(1) **Funding.** Demands for RN personnel must be supported financially. Additionally, when requests are made to increase the requirement for Royal Navy personnel, evidence of FINBP approved budgetary provision must be given.

(2) **Structural Impact.** The PPO must ensure that proposed Establishment changes do not place unmanageable stress on branch structures and that the affected specialisations remain controlled and sustainable. This is managed through the carding process where Profession Managers, in consultation with Career and Talent Managers, consider the following factors with regards to Structural Impact:

(a) **Sustainability.** A sustainable Branch/Profession will normally have a broad base at the junior level which narrows at each higher rank. An unsustainable branch does not allow the PPO to grow enough of the required personnel at each level, and it will not offer an acceptable career for personnel within the branch.

(b) **Harmony.** One of the PPO Personnel Functional Standards (PFS) relates to maintaining individual harmony. Some organisations incur a large amount of separation from home while others do not:

i. **SEA Organisations.** Service in an organisation such as a ship or other front-line unit is recognised as incurring significant time on duty away from home. These organisations are classified in JPA as SEA.

ii. **SHORE Organisation.** Service in an organisation such as the Navy Command HQ or a training establishment is recognised as having a relatively stable work/life balance. These organisations are classified in JPA as SHORE.

iii. **Local Foreign Service (LFS).** Service in an organisation permanently based overseas is classified in JPA as either SEA or LFS. If it meets the SEA criteria it is marked as SEA and if it does not it is marked as LFS.

iv. **Assessment.** When assessing PFS, Profession Managers take account of the balance between SEA positions and the combination of SHORE and LFS positions.

(c) **Planned Augmentation.** Planned Augmentation reflects a known requirement for augmentees during a time of crisis. This requirement is reflected in augmentation manning lists and as ’M Role’ Positions in Establishments with Royal Naval personnel. The PPO has a remit to maintain sufficient Donor Positions to meet this crisis demand and any requests for change need to be considered against the Planned Augmentation situation. Augmentation issues affecting Establishment Administration are discussed in more detail at Annex 2D. Pers Ops can also mobilise people for Planned Augmentation for Ops and Exercises and can request Temporary Augmentation Positions for such a requirement.

(3) **Workforce Requirement Control.** MOD Head Office set the Workforce Requirement (WR) ceiling for the RN, which equates to the total number of workforce driving positions it can maintain; the Service is not authorised to increase this ceiling. To control workforce requirement, it is imperative that the Service remains within its allocated limit, and that robust policies and processes are in place to protect the integrity of workforce structures and budgets whilst detailing the ways in which resource change can be submitted, screened, approved, and implemented. To stay within this agreed limit, the PPO must be provided with a CR to offset the creation of new enduring posts or a WRS or financial approval to stand up temporary posts. Further detail on the use of a CR or WRS is given at Annex 2E.

(4) **Timing.** CTMs have the right to apply a rule whereby an employer may have to wait up to 12 months to have a new JPA position filled or vacated. This ensures that short notice assignments do not cause excessive churn, disrupt unit plans or personal conditions of service. The Service may also need time to grow/reduce personnel within a specified category. To ensure that expectations for change are realistic, it is strongly advised that agreement is reached with the relevant CTM prior to a request for JPA action being submitted via normal engagement with MPPs. For larger changes (raised as an option or choice) an Implementation Order should be agreed by all stakeholders which clearly articulate People Delivery timelines

c. **Changes to Establishments.** This section outlines the general principles associated with requesting an Establishment change. Deleting a post is also an Establishment change that must be subject to the change request process and cannot be actioned without PPO approval. Supplementary information on the detailed Establishment amendment process is given at Annex 2E.

(1) **Minor Change.** Simple amendments that do not alter Workforce Requirement or funding do not require full staffing; a Navy Change Request (NCR) outlining the requested change will suffice. Examples in this category are changing a position name, organisation/location, competencies or supporting remarks.

(2) **Major Change.** All requests for major in-year change should follow the procedures and process currently laid down in the Navy Command Military Workforce Change Process RNTM.

(3) **Changes Agreed at Higher Defence Level.** Some personnel changes are agreed at a higher level in Defence (e.g. Defence Board) and are often associated with setting up or enhancing an existing Joint capability. These changes often involve a change in the authorised RN Workforce Requirement and to the centrally agreed funding for personnel. A modified version of the PPO tests is then applied, which is not detailed any further in this publication.

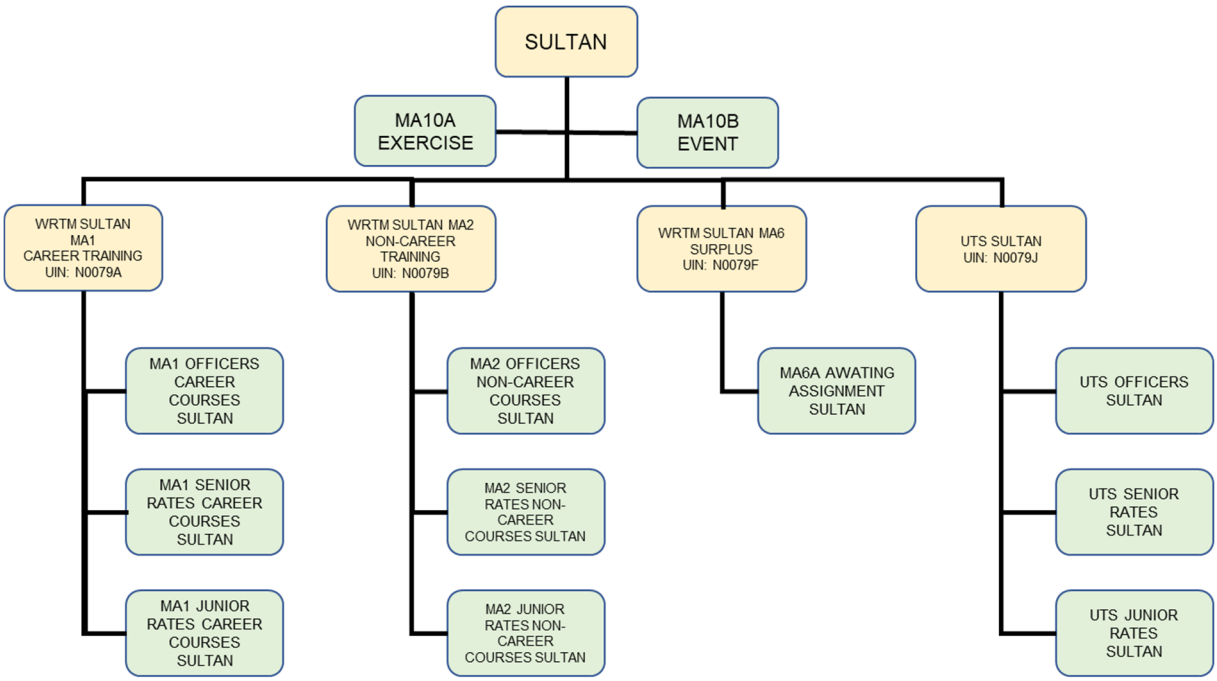
(4) **Transformational Change.** Defence or Navy Command will sometimes impose wholesale change across the Royal Navy portfolio; whilst this is achieved in consultation with Navy Finance and Strategic WF Planners (PSP) it is often forced on the current employer or Profession Manager and, as an exception, does not follow the four PPO tests. Whether the change being proposed is an organisational redesign or the transfer of organisations between 2* areas, all changes must be considered within the parameters of workforce delegation. TLBs/WFMGs must consider the end goal of the large-scale change and the impact this will have on both the Directorates ability to deliver outputs and the capability of the TLB/Navy Command. The sponsor is to draft an Implementation Order (IO) with the relevant stakeholder agreement. Further guidance can be found in the Navy Command Military Workforce Change Process RNTM.

d. **Ships and Submarines.** There are very specific procedures associated with the Establishment for ships and submarines in build. These procedures are explained in detail at Annex 2F. Any changes to current ship or submarine UPL must be agreed with the Dir FGEN or Dir SM Class lead before a Navy Change Request is raised as per the Navy Command Military Workforce Change Process RNTM.

ANNEX 2A

ILLUSTRATIVE STRUCTURES FOR MARGIN ACTIVITY IN ORGANISATIONS AND POSITIONS

Figure 2A-1. Generic Example of Training Establishment WRTM and UTS Structure



Key to Illustrations:

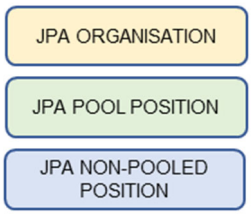
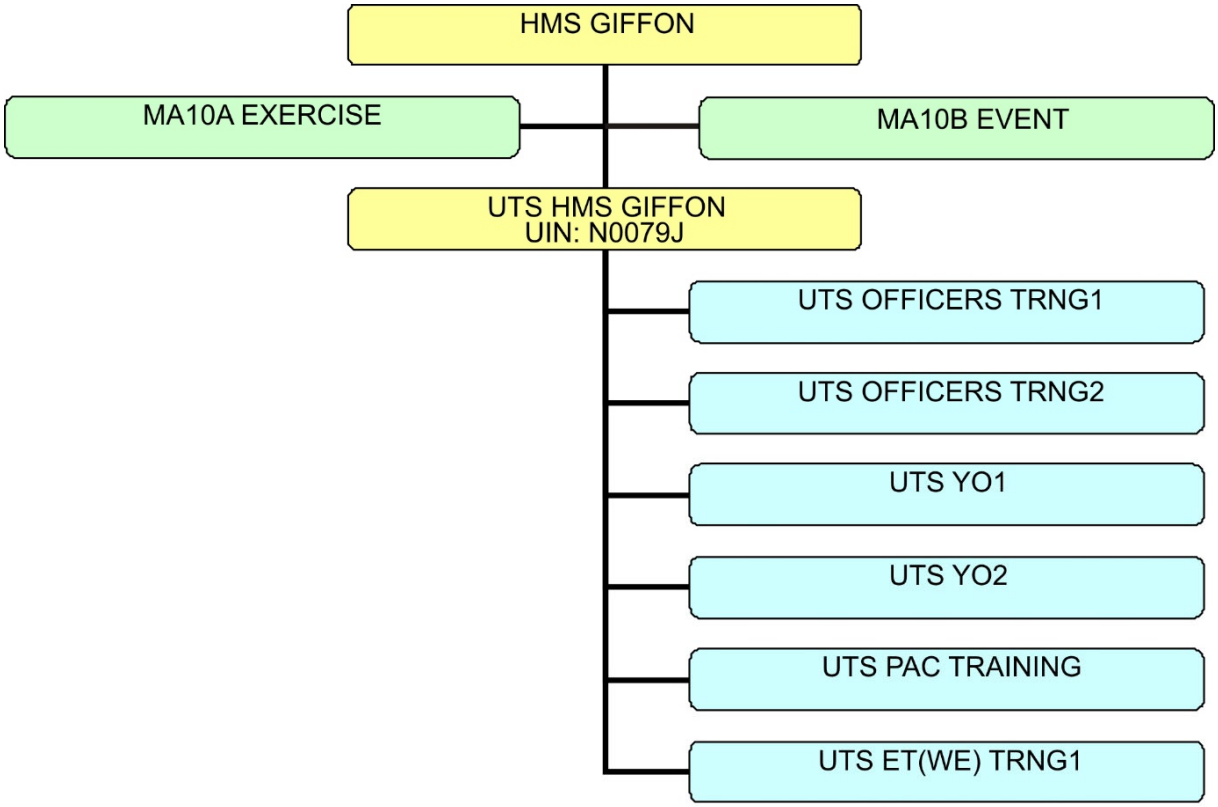
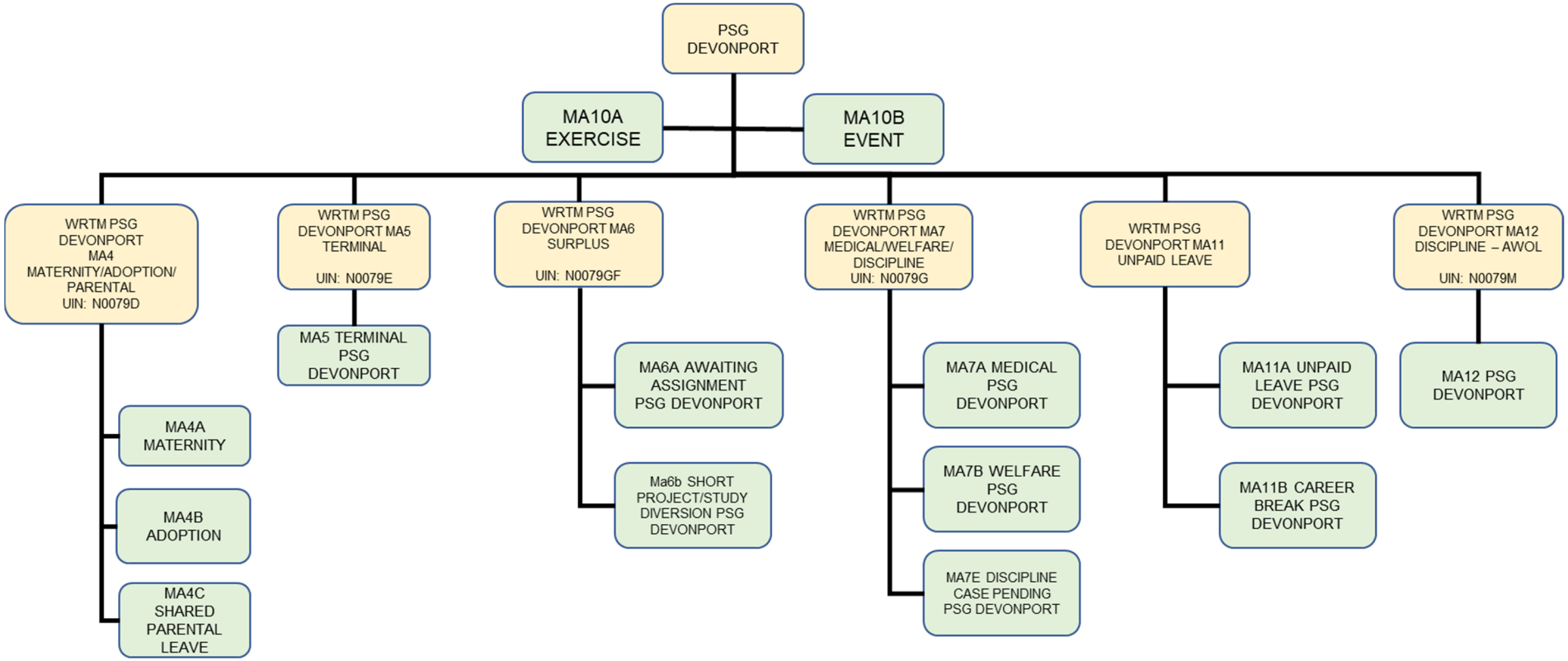


Figure 2A-2. Generic Example of Ship Establishment WRTM & UTS Structure



Note. *Unlike shore establishments UTS positions on ships/SMs are not pool positions.*

Figure 2A-3. Generic Example of Naval Base Establishment WRTM Structure



ANNEX 2B

POSITION CATEGORY AND ORGANISATION STATUS

1. Introduction

Within JPA, each Organisation will be allocated a Status according to its programme. Each position may have one or more Categories. The Organisation Status must match one of the Position Categories for the Position Status EIT to be valid.

a. Positions that are usually dormant but may be required in Crisis are designated as Planned Augmentation positions (M Category when inactive).

b. Ships' and submarines' Status will change according to their programme.

c. Front Line Air Squadron and Flight Establishments will operate totally within the B Status, irrespective of changes in numbers of airframes or of multiple crewing which would be enacted by Establishment changes.

d. RM units will use the same Status options as defined for Front Line Air and Shore Service units.

Table 2B-1. Naval Establishment Status and Position Categories

Category Status Meaning	SHIP	SM	Front Line RM / Air Units	SHORE Unit
Basic Establishment	B	B	B	P
Reduced Sea Going Crew (Adaptive Force)	A	A		
SM prepared for disposal	-	E	-	-
SSBN enhanced single crew	-	G	-	-
Reduced Harbour Crew (Ship preservation by operation, SM lay-up and preparation or Harbour Training Ship)	J	J	-	-
Planned Augmentation Position that may be activated during crisis	M	M	M	M
Non-Crewed ('Nil'). Including Refit / Overhaul for SHIP and SM	N	N	N	N
Operational (Crisis)	O	O	O	O
SM flood up and undock	-	Q	-	-
SM prepare overhaul	-	R	-	-
Upkeep	S	S	-	-
Under Construction (Crewed)	Z	Z	-	-

2. Updating Ship / Submarine Roles in JPA

a. **In Build.** The WCM Team will initially set the Organisation Status to N (Non-Crewed) and then subsequently to B (Basic) as advised by the NAVY PEOPLE-PEP PTP DEV ACQ Team.

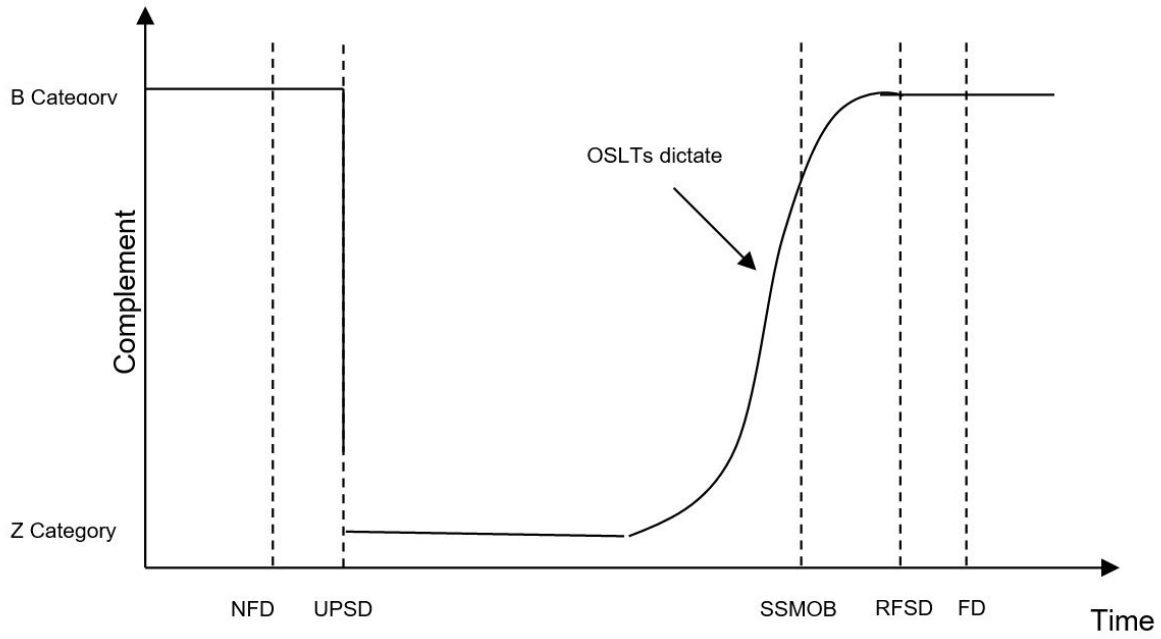
b. **In Upkeep**

(1) For ships/SMs approaching an Upkeep Period, the WCM Team will normally set the S Status to commence at the Upkeep Period Start Date (UPSD), and the B Status Date to re-commence at Fleet Date (as advised by the Complex Warship Support Programme (CWSP).

(2) Once the ship/SM's Upkeep Schedule is known, any required changes to On Stream Lead Times (OSLTs), in order to safely meet the prescribed SARC process and equipment STW prior to SSMOB date, should be forwarded by the Unit to Navy RP and the relevant CDT for approval before being actioned by the WCM Team on JPA.

c. A typical crew profile for a ship in refit is illustrated in the figure below:

Figure 2B-1. Typical Ship Upkeep Crew Profile



d. For ships approaching a docking period or Contractor Support Period (CSP), the WCM Team will normally maintain B Status throughout Non-Fleet Time or the CSP.

3. Final Non-Operational Date

The WCM Team will set the Organisational Status to N (Non-Crewed) on the Final Non-Operational Date as detailed in the RN Command Plan.

ANNEX 2C

JPA ORGANISATIONAL HIERARCHIES

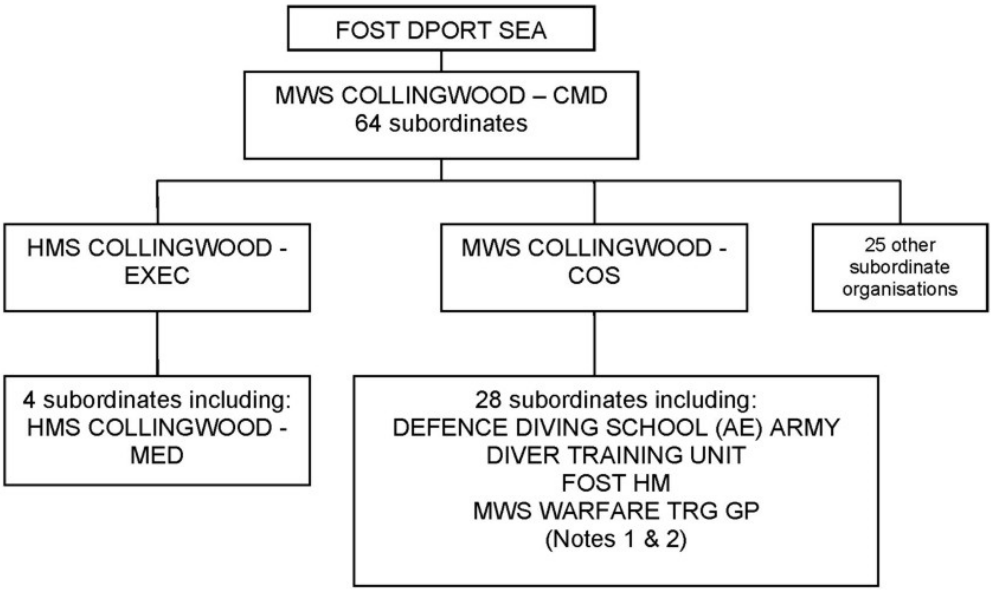
1. Introduction

Each JPA organisation has a Command Hierarchy and an Administration Hierarchy which needs to be set up by the WCM team when a JPA organisation is created. These Hierarchies, which are explained below, need to be agreed with the unit.

2. Command Hierarchy

The Command Hierarchy indicates where an organisation sits within the Chain of Command for a unit and the wider Royal Navy. The Unit Establishment Administrator (UEA) can use the Command Hierarchy (as well as the Administrative Hierarchy) to run Unit Position List (UPL) reports for units and their subordinate organisations (see also Para 4). Business Process Guides are available on JPA to carry out this UPL function. For all other JPA users, the Command Hierarchy does not link to any other JPA activities, which includes SJAR / OJAR functions and Workflow. An example of a Command Hierarchy is shown below:

Figure 2C.-1. Command Hierarchy Linking JPA Organisations in MWS Collingwood



Notes:

1. *The Command Hierarchy is not limited by location or Service but is a representation of the chain of command for a unit. For example, the MWS Command Hierarchy includes subordinate organisations such as DEFENCE DIVING SCHOOL (AE) ARMY DIVER TRAINING UNIT and DIVING STANDARDS ORG that are located at Whale Island, not the COLLINGWOOD site.*

2. *The JPA organisation DEFENCE DIVING SCHOOL (AE) ARMY DIVER TRAINING UNIT is part of a joint RN/Army unit that is part of MWS.*

3. Administration Hierarchy

The Administration Hierarchy determines which unit administers a JPA Organisation in terms of UPO and Medical Centre. This Hierarchy enables a UPO or Medical Centre to see the records of those personnel within their charge. In JPA terms, the UPO or Medical Centre needs to be in a JPA Organisation that is at the top of the Administration Hierarchy of the group of organisations within their charge. The UPO or Medical Centre can then see the JPA Positions and incumbents in their subordinate organisations. The other necessary JPA component that works with the Administration Hierarchy to enable administrative support is the organisation workflow. An example of an Administration Hierarchy is below (note that the details contained may not be up to date):

4. Unit Position List (UPL)

The Administration Hierarchy can be used by the UEA, as well as EAs, to run UPL reports of organisations and their subordinates. This Administration Hierarchy enables, for example, the UEA of COMSTRKFOR to run a UPL for the whole 3 CDO Bde unit, including its subordinate organisations (Business Process Guides are available on JPA for this function). The filter ‘Command Hierarchy’ can also be used in this way and can also be used to view subordinate organisations from a Command rather than administration perspective.

ANNEX 2D

PLANNED AUGMENTATION AND ESTABLISHMENT ADMINISTRATION

1. Introduction

a. Planned Augmentation is part of the Force Generation process and is a procedure whereby units identify, in advance, the augmentation they will require to bring them to endorsed operational levels of personnel. The Planned Augmentation requirement is not based on a specific scenario, but it assumes that there is an overriding need to activate quickly all available front-line units.

b. The additional augmentation posts are labelled on a JPA Establishment as M Category Positions and when activated they are additional to the Positions held on a unit's peacetime Establishment. The summation of the M Category Positions in all units represents the overall Naval personnel Planned Augmentation requirement and it is specified by rank/rate and specialisation. Donor Positions are earmarked to fill this known M Category requirement. These Donor Positions are mostly in shore units and are identified and endorsed in advance as being posts that can be gapped during a crisis. They are identified in a JPA Establishment as P Positions.

c. Managing the force generation requirement for crisis M Category receiver Positions and developing the associated Donor Positions is the responsibility of P&T PEOPLE OPS AUG (Augmentation Cell) Team, with the administrative JPA action carried out by the Workforce Change Management (WCM) Team. To meet this task, each request for an Establishment change must be viewed against the impact it will have on the ability to meet the Planned Augmentation workforce requirement.

2. Position Categories and Planned Augmentation

a. The most common Position Categories having a bearing on Planned Augmentation are shown in the table below:

Table 2D-1. Planned Augmentation Common Position Categories

Position Category	Meaning	Comment
P	SHORE Position required in peace but not crisis.	These are Donor Positions for Planned Augmentation.
PO	SHORE Position required in peace and in crisis.	Incumbents are not earmarked as Planned Augmentation donors.
BO	SEA Position required in peace and in crisis.	Used for ships and frontline RM and aviation units. Also used for temporary crisis Augmentation eg., Operations TELIC and HERRICK.
M	Crisis Position inactive during Peace but activated during Crisis.	Used for enduring crisis Augmentation that requires widespread activation of RN operational units.

b. Incumbents of P Positions are at 30 days' Notice to Move (NTM) for Planned Augmentation purposes. Some of the P Positions are further annotated as being either an 'A Donor' or 'Dual Donor'.

c. **A Donors.** Incumbents of a P Position that is also tagged as an A Donor are at 20 days NTM. These positions have been matched against the known M Category requirement by rank and Specialisation. The aim is to maintain A Donors at 120% of the M Category requirement, but this is not possible in all cases and some ranks and Specialisations may have a shortfall. When M Category Positions are activated, the A Donors are sent to any M Category Position for which they have the necessary rank and Specialisation.

d. **Dual Donors.** Positions marked as Dual Donor are matched to a specific M Category Position. When a specific M Category Position is activated, the intention is to fill it with the Dual Donor incumbent. Personnel in Dual Donor Positions have a training liability in preparation for their M Category commitment and are at 10 days NTM.

3. Establishment Changes and Planned Augmentation

a. Requests for Establishment changes that impact on the M Category requirement or the pool of Donor Positions are subject to extra checks before the change can be approved. These checks are conducted in consultation with P&T PEOPLE OPS AUG staff and seek to keep the pool of Donor Positions in balance with the M Category Augmentation requirement.

b. **Deleting a P Donor Position.** If a P Donor Position has not also been designated as an A Donor, then it means the donor pool for that rank and Specialisation should be in surplus. Once that situation has been confirmed then there is no Planned Augmentation barrier to the Position being deleted.

c. **Deleting an A Donor Position.** To offset the proposed deletion of an A Donor Position, a replacement P Position will be sought that can be converted to an A Donor. The P Position must be of the same rank and Specialisation and, once it has been changed to an A Donor, the proposed deletion may take place. If no P Position is available, then the same effect may be achieved by negotiating the deletion of an M Category Position of the same rank and specialisation. Should both these events not be possible then P&T Staff will adjudicate. The deletion proposal will either be rejected or will be allowed to proceed with the acceptance that the donor pool for that rank and Specialisation will be below the required level.

d. **Creating a new M Donor Position.** If P&T PEOPLE OPS AUG staff confirm there is a genuine new Planned Augmentation requirement, then a search will be made for a suitable donor. If a Donor Position is found, or if a less deserving M Category Position of the same rank and Specialisation can be negotiated for deletion, then the new M Category Position can be created. If these outcomes are not identifiable, then the bid will either be rejected or be allowed to proceed with the acceptance that the donor pool is in deficit.

e. **Deleting a Dual Donor Position.** A Dual Donor Position must be replaced before it can be deleted. The creation of a new Donor Position requires careful negotiation and in the first instance the TLB and/or 2* Directorate in navy Command wishing to delete the Dual Donor will be asked to find its replacement. Should it not be possible to find a replacement then the deletion proposal will be rejected.

f. **Creating a New M Donor Position with Dual Donor Linkage.** P&T PEOPLE OPS AUG staff confirm the requirement for a new M Category Position linked to a specific Dual Donor Position, then negotiations will take place to find a suitable Dual Donor. If a Dual Donor is found, then the new M Category Position will be created; if one cannot be found then the new M Category Position will be rejected or will be created without Dual Donor Linkage.

ANNEX 2E

DETAILED ESTABLISHMENT AMENDMENT PROCESS

1. Introduction

The use of JPA across all three Services provides a standardised Manage Establishment process for creating and making changes to Service Positions and organisations. Under current agreement, each Service will amend its own positions within JPA. All proposed RN Workforce Requirement related changes to JPA Establishment Organisations and Positions are to be raised by or through the relevant TLB Workforce Coordinator. They are to be submitted using either the Workforce Amendment System (WAS) for Navy TLBs or an Establishment Change Request [ECR] via SLIM system, for all other TLBs except SDA & DE&S & DG NUC who still use the Establishment Amendment Form (EAF) for change requests. The NCR is submitted in WAS via SCIO and the EAF forwarded by e-mail to the PPO. For information on ECRs in SLIM please engage with the Establishment Advisor or the WCM Team. The latest version of the EAF may be found in the JPA home page – JPA Forms. Access to the WAS App is for Navy Command (NC) TLB Change Requests only and application for the app should be submitted to the WCM team[1]. For large scale re-organisations or bulk changes, please engage with the WCM Team for advice on how to proceed.

2. Establishment Amendment Background

Outside of the Strategic Planning Cycle (SPC), it is the responsibility of employing TLBs to manage their Workforce Requirements and for the PPO to implement the changes when the four fundamental tests have been met. As the RN possesses a finite resource, all Establishment changes requested by TLBs must be realistic in terms of anticipating the availability of personnel in terms of rank, rate, and specialisation. When processing NCRs in the WAS or ECRs or EAFs, the PPO needs to consider, via the carding process, the collective effect on the RN which may lead to increased churn, higher VO rate and excessive gapping, all of which undermine the ability to deliver a sustained supply of people. Therefore, all requests to create new permanent WR positions or temporary positions must be carefully managed.

3. TLBs are to be aware that the following Establishment policy exists for the creation of Permanent or Temporary Positions:

a. **Permanent Positions.** The creation of permanent Workforce Requirement within the Establishment will only be authorised when:

(1) An SPC enhancement Choice or Option is issued to authorise uplift in liability.

(2) The TLB provides a suitable Compensating Reduction (CR) of the same rank/rate and specialisation to create the new position or with agreement by Branch Managers via the process above.

[1] Via the WCM Multiuser - NAVYPEOPLE-WCMNC@mod.gov.uk

Note. *It is the responsibility of the employing TLB and/or Directorate in NC to identify the CR which will be used to create the new requirement. Proposals to create permanent Workforce Requirement positions without a valid CR or endorsed SPC uplift will not be authorised and sponsors should engage with TLB or in NC their 2* Workforce Management Group (WFMG) points of contact.*

b. **Temporary Positions.** Temporary Positions are posts created for a specific purpose of between three months and one full assignment. Requests for temporary position of longer than one full assignment will normally be rejected. Temporary positions do not count towards WR and, therefore, do not drive recruiting and promotion targets. Temporary positions are usually filled by gapping a position with WR elsewhere or within NC TLB from unspent workforce budget known as the Workforce Cost Envelope (WCE). Temporary positions cannot be used as a means of masking a genuine enduring requirement and the PPO will pay close scrutiny to all requests.

(1) In order to stand up a Temporary Position, the employing TLB should try to identify a position with “Like for Like” WR to be Gapped for the duration of the Temporary Position. This Workforce Requirement Substitution (WRS) is the Gap that will be tied to the Temporary Position for the duration of the requirement if necessary. This is also known as “Authorised Elsewhere” by the Army, RAF, and Other TLBs. The WRS Posn will continue to underpin sustainability of the supplying Branch. Prior to the assignment being completed, the employing TLB should conduct a formal review of the requirement for the Temporary Position and the WRS. If as part of the review the position is viewed as enduring rather than temporary (greater than one full assignment), the TLB will need to provide a CR, in order that an enduring WR position can be created. If a suitable like-for-like Position cannot be found but a TLB has the funding for a Temporary Position, then they can ask if one can be created by exception. If the CTM can fill the temporary position, it will be considered for approval. For NC TLB which operate under a delegated model, with agreement between Profession Manager and Career and Talent Manager, a Temporary Position can be established from unspent WCE or gapping a whole force role (FTRS, CS or REG MIL).

(2) The WRS provided to stand up a Temporary Position should be one that:

(a) Has been or is about to be gapped, or;

(b) Through forecast, is unable to be filled by the CM during the forthcoming length of assignment requested.

(3) Regardless of the method selected, the employing TLB will be responsible for prioritising as to which position is used as a WRS. This process ensures overall liability within the TLB remains in balance and physically ties WR to a Temporary position for the duration of the requirement. Non-compliant applications will be treated on merit and may be approved as an exception. For NC, please follow the delegated Workforce controls as set out in Chapter 2.

Note. *The creation of Temporary positions or Permanent WR to meet future SPC enhancements earlier than approved by FMC will only be approved if the TLB provides a WRS, or by exception. This must occur as a gap will need to be created elsewhere within the TLB to provide the resource (strength) to meet the new requirement.*

4. Establishment Supplementary Positions Policy

With increases in Gains to Trained Strength (GTS), there is a requirement for additional Non-Workforce Driving positions within seagoing units and air stations, solely for the purpose of pulling through SQEP. The introduction of SUPP positions is a direct replacement for the legacy Overborne Strength (OBS) position and the policy detailed below will assist Branch Managers to deliver sustainable branch structures and allows CTMs to manage personnel to support the pull through of SQEP.

a. **RN SUPP.** RN SUPP positions are used for the sole purpose of providing sustainable branch structures and are not to be used as a means of addressing Unit Position List (UPL) or Whole Ship Watch and Station Bill shortfalls. Similarly, CTMs should only fill SUPP positions on the basis that the individual is conducting branch/career specific training. Use for any other purpose requires the approval of the WCM Team. In addition, Units are not to retain an individual in a SUPP position once the intended branch/career specific training requirement has been achieved. Once the intended training requirement has been met, Unit staff should advise CTMs accordingly. The CTM should then re-assign the individual to fill a gapped enduring liability position within the same Unit, or elsewhere, or to another assignment.

b. **RM SUPP.** RM SUPP positions are aligned to each RM sub-Unit for the sole purpose of transitioning personnel within Unit JPA architectures to onward assignments and are not to be used as a means of addressing manning/UPL shortfalls. Use for any other purpose requires the approval of the WCM Team. CTMs should only fill a SUPP position when an individual is required to vacate a position in lieu of new arrival but is required to remain within the existing Chain of Command.

5. Type of Position

The type of SUPP position within JPA is dependent upon rank/rate and branch as outlined below.

a. AB2 positions are to be pooled, multi-occupancy.

b. All other ranked positions are to be single occupancy. In situations where handover periods are required, however, shared positions will be authorised by the PPO.

c. RM positions, regardless of rank, are to be pooled and rank ranged.

d. Positions attracting Recruitment and Retention Pay (RRP) are to be single occupancy unless BMs can demonstrate to PPA that all pooled personnel within the SUPP position qualify for RRP. If a requirement for RRP exists, BMs should submit full justification to REM using policy detailed in JSP 754 Chapter 5 Section 2 (RRP Policy).

6. Position Details

SUPP positions will be created using the following criteria:

a. All positions are to be prefixed with SUPP, e.g. **SUPP PWO1|1234567**.

b. The JOB Value for all SUPP positions is to be **RN|Common|Supplementary**.

c. All SUPP positions are to be correctly CM tagged.

d. All SUPP positions are to be created as Non-Workforce Driving and enduring (no end-date applied).

e. SUPP positions shall only exist within NC TLB and not within other TLB organisations.

7. Establishment Amendment Detail

Proposed changes for JPA Positions and Organisations must be submitted using either the Workforce Amendment System (WAS) or ECR in SLIM, or JPA Form JPA A001 (EAF), the latest version of which may be found in the JPA home page – JPA Forms. Navy TLB units must submit their establishment changes using the WAS App in SCIO. For large scale re-organisations the WCM Team must be consulted in addition to the relevant MIL PP.

a. **Workforce Amendment System (WAS) New Change Requests (NCR)** The WAS NCRhas been designed to ensure that the following conditions are met:

(1) An audit trail is in place and covers all associated authorisations (see below).

(2) Requested proposals contain the mandatory details required by JPA to make the changes.

b. **Completion of the WAS NCR.** The WAS NCR is to be fully completed (where appropriate) by the originator before submission to the Workforce Change Management Team. As appropriate, WAS NCR submissions should include supporting e-mails where appropriate which give evidence of the following:

(1) Financial authority from the appropriate TLB Finance Business Partner especially for all major changes and inter TLB transfers.

(2) WAS/NCR approvals will seek confirmation from the appropriate Branch Managers, (in consultation with Career and Talent Managers) that the proposed amendments are acceptable from a branch/specialisation sustainability perspective.

(3) Where there are DV security requirements associated with the amendments, that approval has been obtained from the respective Service specialist security authority.

(4) Agreement from all Units involved in the WAS NCR process. For example, if creating a Temporary Position in one Unit, by using a WRS Gap in another, then both Units should provide evidence that they are content with the submission.

c. **Common Errors in Submitting Establishment Changes.** Some common errors which should be avoided when submitting Establishment change proposals are as follows:

(1) The amendment has not used the latest Establishment/UPL in JPA as the baseline and has not identified Positions by their unique JPA number.

(2) Changes that increase WR without supporting financial approval, CR or WRS.

(3) Requesting a Rotational or Competition post without approval from DS Sec and the single Services' agreement.

(4) Requesting an Exchange/Loan Scheme where the P&T lead/International Policy and Planning (IPP) has not been consulted.

(5) Requesting change to an Establishment when the appropriate authority has not been sought.

8. JPA Data Requirements

Only data that appears in the list of authorised JPA Data Reference values may be used to request changes. The remainder of this section outlines some of the more common fields and terms used for making an Establishment change in JPA.

a. **Rank/Rate.** NATO Rank Codes (equivalent ranks tables across all Services are laid down in JSP 752 (Allowance Regulations), JSP 754 (Pay Regulations) and in this BR's Preliminary Pages) are used in JPA, NATO and tri-Service documentation as follows:

Table 2E-1. NATO Rank Codes

NATO Grade	Royal Navy	Royal Marines
OF-10	Admiral of the Fleet	-
OF-9	Admiral	General
OF-8	Vice Admiral	Lieutenant General
OF-7	Rear Admiral	Major General
OF-6	Commodore	Brigadier
OF-5	Captain RN	Colonel
OF-4	Commander	Lieutenant Colonel
OF-3	Lieutenant Commander	Major
OF-2	Lieutenant RN	Captain
OF-1	Sub-Lieutenant / Midshipman	Lieutenant / 2nd Lieutenant
OR-9	Warrant Officer 1	Warrant Officer 1
OR-8	Warrant Officer 2	Warrant Officer 2
OR-7	Chief Petty Officer	Colour Sergeant
OR-6	Petty Officer	Sergeant
OR-5	Not used in RN	Not used in RM
OR-4	Leading Hand	Corporal
OR-3	Not used in RN	Lance Corporal
OR-2	Able Seaman	Marine
OR-1	Not used in RN	Not used in RM

***Note**. Although OR1 is not a rank in the RN, some Positions in ships are created as OR1 to identify sea training positions for personnel not yet at Operational Performance Standard (OPS).*

b. **JPA Job Value.** The JOB value comprises of three segments: Service, Domain and Skill.

***Note.** The JOB value for all single Service RN/RM Positions starts with RN.*

(1) Examples are:

RN|Warfare|Warfare (Above Water)
RN|Logistic Services|Logistics
RN|Aviation|Pilot
RN|RM|Adjutant

(2) The JOB value is an essential field when describing or searching for specific Positions or groups of Positions. Once a JPA Job Value has been attributed to a Position it cannot be amended. Any changes to this field will necessitate the Position being eliminated and a new Position being raised to show the revised value. It is therefore essential that the correct value is shown on the WASJPA Data Reference Values should be used to identify the most appropriate value for any new Positions.

c. **JPA Competence.** JPA Competence comprises the skills, competences or accomplishments allocated against a given position to enable the incumbent to carry out the role. Requests to add competences may be referred to Capability Delivery Team (CDT) / Branch Manager and TRA Gen WO1 for approval, as the change may have safety or operational implications or may result in increased tasking on training schools and can restrict the number of personnel available to fill a post. When possible, Platform UPLs should remain aligned.

d. **Recruitment and Retention Pay (RRP) Markers.** RRP Markers may be applied to specific Positions and approving their use depends on several factors, including that the post should only be filled by a person with the appropriate specialist qualification. The WCM Team will not add or remove RRP Markers to/from a position unless approval has been given by the appropriate RRP authority [REM], in accordance with JSP 754 Chapter 5.

e. **Normal Tour Length.** The tour length is shown in months and, where continuity is required beyond normal assignment length, justification and CTM approval is required.

f. **Temporary Positions.** A Temporary Position is created to meet a specific short term high priority demand for strength. It is created for a finite period between three months and one full assignment. Temporary positions do not count towards liability and, therefore, do not drive recruiting and promotion targets; they still require budgetary approval by the TLB. In the current manning situation, they are usually filled by gapping a position with WR elsewhere, which is clearly undesirable. No Temporary Position will be created until the appropriate Career and Talent Manager has agreed to provide an incumbent at the Positions start date.

g. **Rotational/Competition Positions.** Requests for new posts are to be staffed for approval by the appropriate authority:

Table 2E-2. Staff List Authorities

List	Authority
Senior tri-Service Appointment List (STAL)	DS Sec
Junior Rotational List (JRL)	DS Sec
Joint Medical Posns are now managed by UCM	UCM MED

h. Staffing rules vary; JSP 755 is the authoritative reference for both Rotational and Competition Positions. Tours for rotational posts are projected several years into the future and the WCM Team ensures that they are kept up to date and in accordance with the appropriate authorised list.

i. **Exchange Positions.** All requests to change Inter-Service and International Exchange Positions must be staffed via the P&T lead:

NAVY PEOPLE-CM COS & NAVY PEOPLE-CMCF LFS COMP

j. **Loan/Secondment Positions.** All requests to create or amend a loan or a secondment position must have International Policy and Planning (IPP) approval as detailed in JSP 755 Chapter 4 and JSP 468.

k. **On-stream Lead-time.** A sea-going unit may be assigned a Status that requires a joining profile leading up to full B Status manning. Thus, in the Z, S and Q roles, a figure such as 0032 will mean that the Position concerned should be filled 32 weeks before the unit assumes B Status. Changes to On-Stream Lead Times can have an impact on Liability and so full justification using a Change Proposal Form (CPF) and WAS NCR/EAF is required when the request is made to Navy RP and the CDT.

l. **Dual Appointments.** The Position Planning Extra Information Table (EIT) in JPA allows requirements for Dual Assignments to be specified. All requests involving Donor Positions and Dual Appointments are cleared with Pers Ops staff prior to their endorsement.

m. **UIN.** An Organisation must have a UIN annotated to it and all Positions in an Organisation are costed to the same UIN. Where a unit is comprised of personnel funded by more than one UIN, then its Establishment must be comprised of multiple Organisations. UINs are to be supplied by the TLB Budget Manager who is responsible for funding that Organisation. If the UIN does not exist in SLIM/JPA, then it is the responsibility of the submitting TLB Budget Manager to have it added (actioned by means of completing a MoD Form 942).

n. **Overlap.** Overlap indicates the handover period, in days. Where the field is blank in JPA then either the standard handover period of four days applies or there is no handover period. Career and Talent Manager authorisation is required for any increase to the standard handover period as this inevitably causes a longer gap elsewhere.

o. **Margin Pooled Positions.** Units requiring the creation of additional pooled Positions should email their needs to the WCM Team. The team will assess whether these can be met by the existing margin structure, ensuring that the number of pooled positions are the minimum to meet the requirement. The criterion is that pool positions should exist wherever managers need to exercise administrative oversight of the individuals assigned to the margin areas. In the case of MA5, these now exist only in Personnel Support Groups (Devonport, Portsmouth, Faslane, Culdrose and Yeovilton only) and Cdo Units. All RN personnel are to be assigned to one of these for Terminal Leave to afford divisional care. This does not preclude all units with a Service pay facility from conducting release routines.

ANNEX 2F

ESTABLISHMENT POLICY SPECIFIC TO SHIPS AND SUBMARINES

1. Introduction

This section describes the manning process for new build ships and submarines. The key elements in this process are the Quarter Bill (QB), the Establishment, the accommodation requirement, the Ship Specification, and Concept of Use.

2. The Workforce Allocation Process

a. The workforce allocation process for new build platforms starts on initiation of the Concept Phase. During that phase, an initial QB is produced by DE&S using tasks derived from the platform's User Requirements Document (URD), Ship Specification and Concept of Use documentation. From this QB an initial Establishment will be generated by DE&S in consultation with People Future Capability, Workforce Change Management (WCM) Team, key stakeholders and other SMEs. Once agreed, the WCM Team is issued with the QB Spreadsheet and creates the organisation and positions on JPA, as directed, with the future start dates.

b. As the project moves forward DE&S will progressively develop a more targeted QB and Establishment. In liaison with the WCM team, the overall numbers and Specialisations of the Positions in the Establishment will be refined, and the accommodation requirement will be calculated. The accommodation requirement is determined by the number and rank/rate of the Positions in the Establishment plus an Accommodation Margin.

3. The Quarter Bill (QB)

a. The basic working tool during the assembly of an Establishment for a new class of ship is the QB (not used for Minor War Vessels (MWV) and Submarines). This is a statement of the Positions that need to be filled by personnel to work on a unit. It identifies where there is a job to be done and the lowest level of SQEP needed to fulfil the task.

b. At an appropriate stage, responsibility for the QB will be transferred from DE&S to the platform. It will be a guide to the stationing of the platform's company and will show how the numbers allowed in the Establishment have been assessed. Each individual platform will also produce a Watch and Station Bill (WSB) which further breaks down the QB and allocates individual names to specific tasks, including whole ship responsibilities.

4. Organisational Build Status

The Establishment is the detailed means by which the personnel requirement of the QB is fulfilled and caters for the heaviest demand for the total workforce on board that can routinely be expected. An Establishment will be in force from build to disposal and during the lifecycle of the platform it will go through different phases from initial build (Z Status), to Operational (B Status), to refit (S Status) and finally disposal. The Positions required within an Establishment vary depending on the Organisational Status (for example in upkeep (S Status) a ship's company may be significantly reduced from the full (B Status) complement). The Organisational Status is reflected in JPA (a full listing of the various status codes is at Annex 2B) and used to make Positions 'Invalid' when they are not required. Another example of this is if a new item of equipment is fitted. The Platform will need to assess whether personnel will have to have new competencies allocated to their position, or if a change of structure within the affected department is required; in both these instances a Workforce Amendment System (WAS) request should be submitted via the relevant Capability Delivery Team (CDT) to the WCM Team.

5. Through Life Management of the QB and Establishment

Once created, the QB and Establishment continue to be reviewed and managed as required by changes to policy, concept of operations, the introduction of new equipment and, most importantly, to reflect class 'best practice'. All such activity involves close liaison between the platform EWO/UEA/Senior Management, Unit Establishment Administrator, and the RN WCM Team.

6. Pre-joining Training Requirements

Once the Business Case (BC) for a new class of vessel has been approved, a Training Needs Analysis (TNA) is conducted to identify the best means of providing the training required for the platform. The resulting competences requirement should be input onto JPA by way of a request in WAS via the RN WCM Team. Seek consultation with the WCM Team in the first instance.

7. Accommodation Margin

a. The Establishment of a platform will dictate the minimum number of bunks required on board. In addition to this minimum, further bunks will be required to account for extra boarded personnel as well as flex within the unit itself. The calculation of the Accommodation Margin is very platform specific, depending on size, role, and design use. Once established the Accommodation Margin will be controlled by the EWO/Cox'n.

b. For each new project build, DE&S will use the Establishment, calculating in other factors as detailed in the Accommodation Margin Elements (see para 8), to find the accommodation requirement for the platform. The additional requirement for bunks is given by the Accommodation Margin and the total accommodation requirement is therefore driven by the Establishment plus the Accommodation Margin.

8. Accommodation Margin Elements

The following is a list of different Accommodation Margins that can be utilised:

a. **Board Margin.** A defined number of bunks allow for changes in Establishment policy during the life of the platform.

b. **Advancement Margin.** A defined number of bunks for LHs (where applicable), CPOs and POs to allow for personnel promoted during assignment.

c. **Training Margin.** A defined number of bunks for officers and ratings to allow for training needs identified to be fulfilled for the specific platform.

d. **Staff Margin.** A defined number of bunks for officers and ratings to allow for visiting staff; this could include FOST staff, inspection teams, METOCs, medical/Chaplaincy Staff, embarked forces, embarked flight crew/air groups, Battle Staff etc.

e. **Flexibility Margin.** A margin of two JR bunks for each gender, or cabin if applicable to provide a variation of the onboard mix of gender personnel.