

COMPILATION OF STATEMENT OF TRAINED REQUIREMENT FOR A DEFENCE TRAINING ESTABLISHMENT

- Details of the Statement of Trained Requirement (SOTR) are contained in JSP 822 Part 3 Chapter 2, the Management of Individual Training & Education in Defence.
- The policy applies across Defence (inc DTR) and, therefore, has to be interpreted, **while retaining the principles**, for use in different contexts.
- This note details how the DGTE TrgPol staff envisage how a SOTR would be compiled for a Defence Training Establishment¹.

PRINCIPLES

- The SOTR is to be expressed in a common format; a copy of this common format can be found in JSP 822 Part 3 Chapter 2 Annex C.
- The SOTR is output-based and is, therefore, to detail the **required output** from Phase 2 or 3 courses.
- The SOTR can detail requirements for whole courses or they may be listed as related modules; this is particularly useful if a Phase 3 course consists of 3 modules and the 3rd module is undertaken following a period of consolidation/experience after the 2nd module and as a result the 3rd module may be in a different training year to the other 2 modules.
- The course length is to be expressed in a whole number of training days, rounding up where the course length is not a whole number of days.
- The minimum number of courses in a training year, one of the columns on the form to be completed, is dependant on a number of factors, namely:
 - Phase 2 Output:
 - Any known and established factors from the recruiting process.
 - Any capacity constraints in Phase 1.
 - Any capacity constraints on the Phase 2 course.
 - The capability of FLC to absorb “gains to the trained strength”.
 - Phase 3 Output:
 - Any constraints on FLC to release personnel to undertake the training.
 - Any capacity constraints on the Phase 3 course.
- If none of the above factors impact, the minimum number of courses in a training year should be “one”.

¹ Throughout this document the term “training establishment” refers to the place/organisation that delivers the training.

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STAGE ONE

- Firstly, the SOTR Co-ordinating Organisation for each Armed Service [RN (inc RM) – RN ICG; Army – DITrg(A); and RAF - HQ 22(Trg)Gp] should compile the SOTR for all its **own** personnel (inc all classes of Reserves).
- Each SOTR Co-ordinating Organisation for the Armed Services should also include in the appropriate column any IDT requirement it is aware of.
- Where any of the training required by a single-Service is to be carried out by a Defence Training Establishment, at this stage the Armed Service SOTR Co-ordinating Organisation should consult with the Training Requirements Authorities (TRAs), the single-Service manpower planners, and possibly the recruiting staff and the DE&S organisation to develop a robust requirement that is based on need and practicality of fulfilment (eg numbers can be recruited, personnel can be released to undertake the course, impact of operational commitments).
- At this stage, the single Service SOTR should not normally include personnel from other Services (inc civil servants or contractors). The SOTR for MOD civil servants should be compiled by DGCP and/or DE&S, but SOTR compilation by these organisations is relatively novel. Therefore, while not ideal a pragmatic approach should be adopted until DGCP and DE&S can become more experienced in compiling a SOTR for MOD civil servants and a clearer methodology is established for capturing the training requirements for contractors and the like; the following is suggested:
 - It might be that a single Armed Service has responsibility for a particular group of civil servants within one the Armed Services TLBs (FLEET, LAND, AIR) and is aware of their training requirement. Therefore, these civilian personnel might be included in a single Armed Service SOTR, but the relevant SOTR Co-ordinating Organisation should ensure that all interested parties (the single Service SOTR Co-ordinating Authority whose Service has responsibility for the delivery of the relevant Defence training, DGCP and/or DE&S) know that these civil servants have been included on a specific SOTR so that there is no double counting.
 - The lead Service of the Training Establishment may be aware of a contract to procure the training for other groups or historically know of training undertaken by a particular group of MOD civil servants. In such circumstances, that training requirement would be listed as an “IDT” or “Other” requirement, as appropriate on that lead Service SOTR.
- In both cases appropriate notes explaining the requirement are to be included on the single-Service SOTR.

STAGE 2

- The single Service SOTR Co-ordinating Organisation, whose Service has responsibility for the delivery of the relevant Defence training, should draw together all the relevant single Service SOTRs to compile the combined SOTR for a particular Defence Training Establishment [HQ 22(Trg)Gp would compile the combined SOTR for each of the Defence Colleges in DTR Package One and, similarly, DITrg(A) for the Package 2 Colleges]. For the purposes of this note, it will be known as the “Lead Service SOTR Co-ordinating Organisation”.
- The appropriate Lead Service SOTR Co-ordinating Organisation should check the robustness of the information provided by other Services (eg Is the requirement close to historic norms and, if not, has the change been explained? Has that single Service consistently filled the number of places allocated? Has a check been undertaken to eliminate “double counting”, particularly of the MOD Civil Servant, IDT and “Other” requirements).
- Using this combined SOTR, the appropriate Lead Service Co-ordinating Organisation will then work with the Training Delivery Authority (TDA), particularly its finance and plans staff, and the Training Establishment to determine whether this combined SOTR, as it stands, is deliverable and, particularly, whether there is sufficient resources especially for Year One (but also the following 3 years).
- If it is affordable and therefore deliverable, then the SOTR can be endorsed by the 2* of the TDA.
- If it is not deliverable (usually because of insufficient resources), then that Lead Service SOTR Co-ordinating Organisation will need to work with a whole range of stakeholders to close the affordability gap. The possibilities are (probably in order of consideration):
 - Can the training programme be adjusted so that the resources required to deliver the SOTR are reduced? Does that meet with the TRA’s requirements and, if not, can the TRA accept it?
 - Is the organisation responsible for the “IDT” or “Other” requirement paying a fair cost to the relevant TDA for that training?
 - Is it reasonable to submit an option into the STP process to increase the resources?
 - If such a submission is unacceptable or unsuccessful, what actions would the relevant single Service, whose training cannot be delivered, wish to take? Would it wish to reduce the training requirement within that Defence Training Establishment, or would it wish to reduce its requirement in another training establishment to allow the sufficient transfer of resources?
- Once the affordability gap has been closed (by determining the course of actions from the above), the SOTR can be endorsed by the 2* of the TDA. Clearly, for audit purposes the steps taken to achieve the endorsed SOTR must be recorded.

STAGE 3

- From the endorsed SOTR the TDA can task the Training Establishment in finalising its SOTT to deliver that requirement. The SOTT is to contain, **as a minimum**:
 - The course profile (number of courses, with start and finish dates).
 - The total trainee/student input number and the disaggregated² number by course.
- As stated in the policy (see Annex A) the SOTT may subsequently change for a variety of reasons. Again, details of how the SOTT has changed compared with the endorsed SOTR must be kept for audit purposes.

² This is the number of students per course.