

THE GIRLS' BRIGADE IN SCOTLAND

STATEMENT FROM THE EXECUTIVE ABOUT SUCCESSION PLANNING – JANUARY 2024

Introduction

The original Succession Planning Policy (SPP) was circulated in June 2016 and stated the following:

- *No leader to be commissioned after their 60th birthday but they may undertake training and take on the role of a Trainee Leader by completing Induction level training.*
- *Captains will step down from their role in the GB session in which they have their 65th birthday but may continue as leaders in the company until the age of 70, see below. Alternatively, some may choose to step down from leadership entirely and could be awarded the role of Honorary Captain. (This may be a role they could hold jointly with another former Captain.)*
- *In the year of their 70th birthday **ALL** leaders will retire from full time active service within the company.*

The SPP gave Companies two years in which to implement the changes in order that 1 September 2018 would see the policy firmly embedded.

The months following the introduction of the SPP were difficult for Girls' Brigade Scotland (GBS) with legal challenges, etc. Subsequently, it was agreed that where there was no immediate replacement for a Captain that they could continue until their 70th birthday. Many Leaders and Captains followed the SPP and stepped down by the original implementation date while others worked hard to secure succession planning in their Company.

The pandemic further complicated issues as many Leaders chose not to return and this increased the pressure on those remaining. On that basis, the Executive issued a statement on 26 June 2023 which stated:

Statement from the Executive in respect of Succession Planning Policy – June 2023

Following discussion with Commissioners recently, the Executive wishes to clarify its position about the Succession Planning Policy introduced in 2016. As previously stated, the primary message is that this is not a policy which GBS will rigorously enforce and that it will be a matter of personal integrity for leaders as it is with all policies unless there is a serious breach of trust, the safety of a girl or leader is compromised or an individual wilfully brings the organisation into disrepute, at which time the Executive would have to enforce policies and procedures.

The Executive accepts that for some Companies, as well as some individuals, that withdrawing from Company at the age of 70, particularly if you are in the role of Captain/Leader-in-Charge may be difficult if there is a shortage of Leaders. That is why the Chief Executive has worked with those in this position to allow them to continue on a year-by-year basis if they are in good health, physically and mentally. The Executive wants this to continue for those who find themselves in this position and they are asked to liaise with their Commissioner who can bring the issue to the attention of the Chief Executive who will review each case. This would be done annually.

Companies would still be asked to recruit and train new Leaders for the future with a view to avoiding placing additional strain on those who may be fit and healthy but who would prefer not to

be continuing in a leadership role after the age of 70. Recently a 79-year-old indicated they wished to volunteer, and they were willing to undertake training. This had to be checked with our lawyers and insurers which resulted in the statement below:

“The policy clearly states that we will not commission any Leader after their 60th birthday but they can enrol and do Induction Training but that 70 should be the upper age limit for being in Company. Our Insurers have stated that they will not insure anyone who is 80+ and they see no value in allowing an individual to undertake recruitment and training when she would have to retire within the year. Our lawyers agree with this. They have also advised that the current policy remains in place and that GBS is being proportional in terms of fairness by assessing cases on an annual basis, as and when they arise.”

The Current Position

When GBS was advised about the insurance situation for Leaders aged 80+ steps were taken to work with those in that age range, or heading to that age, to ask them to step down. A number of Leaders have done this in a few short months while those aged 75+ are aware that they need to make plans to allow them to step down. One Division has expressed concern about this, and several letters have been received from concerned parents and one letter from the husband of a Leader in another Division who has stepped down. A further complication has arisen in that the insurers have advised that the information provided earlier this year was not strictly accurate in that they will cover Leaders aged 80+ for one part of the policy but not for another. These factors have led the Executive to review the SPP alongside input from the insurers, risk assessors and our legal team.

The Executive is unanimous that it would be wrong to provide insurance cover which does not fully cover every Leader. Advice has been given that individual Leaders could fill in medical questionnaires annually and that they should be risk assessed to ensure good physical and mental health. The Executive does not believe that is fair or proportionate as it would require individuals to provide personal and medical information, which they may not wish to disclose, and GBS does not have the personnel qualified to assess these as this is a very specialised area.

As the Executive considered all aspects of this situation, thoughts turned back to the introduction of the original SSP and the many Leaders and Captains who had embraced the spirit of it and stepped down to meet policy requirements as they were asked to. Seven years later, a much smaller number have stepped down at 80 or over on the basis that this is what the insurers had advised. Questions arose about how they must feel to see their fellow Leaders having ignored the SSP and how unfair it was for those who had, with integrity, stepped down in line with the organisation's policy then or now. The Executive has tried to be proportionate and fair in allowing those Leaders/Captains over the age of 70 to continue due to individual situations and/or the pandemic but in doing so there is a realisation that this has not been fair on those who chose to step down previously.

The legitimate aim of the policy is to ensure that Leaders can progress through the organisation to take on positions of responsibility while maintaining health and safety of all attendees on a Company evening while avoiding unnecessary risks. This is to ensure that Leaders can grow and progress in the organisation to provide a stable platform for Companies in the future. A similar model can be found in the Church of Scotland where Ministers of Word and Sacrament must retire from full time ministry by the age of 75 or, for those more recently ordained, by the age of 70. These Ministers who retire may take on locum posts or other duties but not full-time work. This is similar to GBS Leaders who retire as they can take on roles in Division or work behind the scenes in their former Companies to assist with fundraising, organising events, etc. Several Leaders have already taken on such duties, and we are aware that many Divisions would welcome input from experienced Leaders.

The Way Forward

The Executive has agreed that in fairness to all those who have embraced and followed the original SSP and to maintain the principles of it going forward that the spirit of the original policy will come into effect as of 1 January 2024. To ensure that those affected by it have time to make plans there is an 18-month lead in time as outlined below.

- Those born in 1949 or earlier should retire from GB Scotland no later than June 2025.
- Those born between 1950 and 1954 should also retire from GB Scotland no later than June 2025.
- Those born in 1955 and after should retire at the end of the GB session in which they reach their 70th birthday.

This document should be read in conjunction with the revised Succession Planning Policy (2024). As with all other GBS policies it is expected that all Leaders will abide by the revised policy, which will be adhered to as with all other policies.

Caroline Goodfellow
Chief Executive

January 2024