

POOLE CHARTER TRUSTEES



HANDBOOK

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The Charter Trustees

Background

The former Borough of Poole was abolished in 2019 following the reorganisation of local government in Dorset.

Following this reorganisation, Poole retained its borough charter status through the establishment of Charter Trustees in the Local Government (Structural Boundary Changes) (Supplementary Provision and Miscellaneous Amendments) Order 2019, which was laid before parliament on 16 January 2019 and subsequently made on 20 March 2019.

Purpose

The functions of the Charter Trustees are limited to:

- a) Appointing the Mayor, Deputy Mayor, Sheriff and other honorary roles;
- b) Ensuring the safe custody of the Charter of Incorporation;
- c) Acquiring, holding, administering, maintaining and improving historic property of a ceremonial nature including by arranging events to promote awareness of such historic property, the Charter Trustees and the Mayoralty; and
- d) Dealing with any business permitted by law.

Under c) the Charter Trustees are responsible for maintaining and securing the historic and ceremonial property, which is listed on the Asset Register. The Civic team ensures that the items listed on the Asset Register are maintained on a regular basis and a full asset verification takes place annually.

The Charter Trustee Regulations 2009

The Poole Charter Trustees have been established in accordance with the Charter Trustee Regulations 2009. [The regulations can be found here.](#)

This Handbook should be read in conjunction with the approved Standing Orders, which can be found alongside all statutory documents here: [Poole CT Statutory Documents](#)

Membership & Political Neutrality

Each Bournemouth, Christchurch and Poole (BCP) Council Councillor representing a ward falling wholly or partly within the boundary of the preceding Borough of Poole council will automatically become a Charter Trustee (“Trustee”) on their election.

The Charter Trustees is an apolitical body. Each Trustee will:

- When acting as a councillor, have responsibilities to the electors of his or her electoral ward and may possess a tie to a political group on BCP Council.
- When acting as a Trustee, have a duty to promote the Purpose while being accountable to Charter Trustee precept payers.

Trustees, when acting in that capacity, must not act in a manner or behave in such a way which conflicts with the Purpose, or which would give a reasonable person the impression that they have brought the office or the Charter Trustee into disrepute.

Removal of a Trustee

The Charter Trustees Regulations 2006 states:

- e) (6) Any Councillor appointed under this regulation shall (subject to paragraph (7)) hold office as a Charter Trustee until the next election to the relevant council or such time as that person ceases to be a councillor, whichever is the sooner.
- f) (7) Charter Trustees may remove from office a Councillor appointed under this regulation if, in their opinion, that Councillor has, without sufficient cause, failed to attend two or more consecutive meetings of theirs.

A Charter Trustee may submit a request in writing to the Clerk that they be removed from the membership in accordance with section (7) above.

Positions and Key Roles

CHARTER TRUSTEE KEY POSITIONS AND ROLES

CIVIC APPOINTMENTS

- Mayor – Trustee position
- Deputy Mayor – Trustee position
- Sheriff – honorary Trustee position
- Ceremonial Advisor –honorary position

ADMINISTRATIVE OFFICE HOLDERS

- 2 x Budget Signatories – Trustee role
- 1 x Trustee to carry our Bank Statement Verifications – Trustee role
- Clerk – officer position
- Responsible Financial Officer – officer position

REPRESENTATIVES ON OUTSIDE BODIES

- 2 x Members of the Association of Charter Trustee Towns (ACTT) – Trustee role

For processional order see Standing Orders.

Civic Term

The Poole civic term is three years, comprising:

- First Year – serving as Sheriff;
- Second Year – serving as Mayor;
- Third Year – serving as Deputy Mayor.

Meetings of the Trustees

Four Charter Trustee Meetings will be held each year which Charter Trustees will be summoned to attend. Details of Charter Trustee attendance are available on the Charter Trustee website.

In accordance with item 2 of the Standing Orders, the Annual General Meeting (AGM) of the Charter Trustees shall be held within 21 days of the Annual Council Meeting of the Principal Council.

There is a quorum of one third of Charter Trustees required to be in attendance for business to be carried out. The meetings take place in the following months with the dates agreed by Trustees at the AGM.

Meeting dates:

- May: AGM and Mayor Making, Statutory Role appointments, officer appointments, calendar of meetings
- June: Annual Governance Statement sign off and Internal Audit Inspection Report
- October: Mid-Year Finance Update and pre-Budget Setting
- January: Final Budget and Precept Setting

The Mayor may call extra meetings, if they consider this necessary. Seven days notice will be given for extra meetings, except in an emergency.

A Schedule of meetings, including meeting agendas and minutes, can

viewed on the BCP Council website here: [Poole CT Meetings](#)

Working Groups

The Charter Trustees have established one Working Group, as follows:

Civic Working Group (CWG)

The Civic Working Group shall:-

- Consist of up to ten members consisting of the Mayor, Deputy Mayor and Sheriff, the two budget signatories and five other Charter Trustees to be selected by voting of the Charter Trustees.
- Be chaired by the Sheriff (or in their absence a Working Group member other than the Mayor or Deputy Mayor selected for the duration of the meeting by a vote) and supported by the Clerk;
- Meet at times to be set by the Working Group;
- Have authority to extend meeting invitations to non-member Trustees as required, e.g. budget preparation;
- Prepare proposals for presentation to the Charter Trustees on the following items in addition to any other business agreed by the Working Group:
 - Precept, spending and budget preparation
 - Promotional and communications strategy
 - Event planning (e.g. Mayor-Making)
 - Appointment of Clerk
 - Appointment of Ceremonial Advisor

The Chair of the Civic Working Group will present the report of the CWG at each meeting of the Charter Trustees and will seek approval from the Trustees for any recommendations therein.

The Charter Trustees may form other working groups from time to time.

Role and Responsibilities of the Budget Signatories

Principles

1. A transparent framework of financial management responsibilities and decision making is essential to the effective management of the Charter Trustees financial affairs.
2. All Charter Trustees and Officers share the common duty to abide by the highest standards of integrity and propriety when making decisions about the use of public monies.

Responsibilities

1. To support the Charter Trustees in maintaining the principles detailed above.
2. To support the annual budget and precept setting process to ensure the ambitions of the Charter Trustee are reflected in the annual budgets.
3. To consult with officers on proposed expenditure which is not part of the approved budget and to report to the Charter Trustees on action taken as appropriate..
4. To approve the reimbursement of expenses incurred by the Mayor in the course of his/her civic duties. (See 'Reimbursement of Expenses, below).

Bank Verification Role

The bank statements will be sent to the nominated Charter Trustee on a quarterly basis for them to verify and agree the bank statements.

Reimbursement of Expenses

Charter Trustees have approved a budget for the reimbursement of 'out of pocket' expenses incurred by the Mayor and Deputy Mayor.

Claims can be made to the Budget Signatories via the Civic Team and must be accompanied by receipts. Each claim will be assessed on a case-by-case basis and Budget Signatories may choose to reimburse a claim in full or in part. Charter Trustees are responsible for declaring any claims for tax purposes.

Examples of such claims include but are not limited to:

- Transport fees in line with BCP council allowances;
- Entrance fees;
- Token gifts and hospitality;
- Event appropriate clothing or footwear;

Selection to Office

The principal objective of the selection procedure should be to reach agreement between all Trustees to ensure that the formal decision at the Annual Meeting of the Charter Trustees is unanimous. It is recognised that this cannot, unfortunately, always be achieved, however, the dignity of the Office of Mayor, Deputy Mayor and Sheriff is likely to be impaired by any public disagreement on such a matter at the Annual Meeting.

Whatever procedure is adopted, the following points are important to bear in mind:-

- The selection of a new office holder should ordinarily be made in good time before the Annual Meeting to allow the person selected sufficient time to make adequate preparations for their year of office.
- If the person selected is subsequently defeated at the polls in an election year, a fresh selection will have to be made in the very short time between election day and the Annual Meeting of the Charter Trustees.

At all stages it should be quite clear that until the formal election at the Annual Meeting, all that is being done is to select the person who will be proposed to fill the office in question. This is because the only occasions when the appointment to office of Mayor, Deputy Mayor or other designation can be considered are:-

- (i) at the Annual Meeting of the Charter Trustees; or
- (ii) when filling a casual vacancy in the office in question.

The procedure for selection of office-holder elect is set out below:

SELECTION OF THE MAYOR, DEPUTY MAYOR ELECT AND SHERIFF

Procedure (in a non-election year)

Each year all Charter Trustees who are eligible to fill the office are invited to indicate whether they are willing to be considered by the Charter Trustees for the Office of Sheriff for the following Municipal Year.

The invitation is sent out at the end of November/beginning of December with a return period of at least 21 days, avoiding the Christmas and New Year period.

If there is more than one candidate, the Clerk to the Charter Trustee informs each candidate of any other names submitted and any candidate who wishes to do so may withdraw at that stage.

If there is more than one candidate then remaining, a ballot will be held. If the result of the ballot does not show a clear majority for any one candidate, the ballot will be repeated as often as necessary.

Where the Charter Trustee decides to schedule additional meetings, the result of the ballot shall be reported to the next ordinary meeting for the appointment of the Office-Elect/Designate. Where there is no ordinary meeting scheduled, the result of the ballot shall be reported electronically to all Charter Trustees. Of course, the formal appointment takes place at the Annual Meeting.

The Charter Trustees shall be advised of the ballot result at their meeting in late January the names of those Trustees who shall be designated Charter Mayor Elect, Deputy Mayor Elect and Sheriff Elect. Except in exceptional circumstances and in line with the traditions of the office, the Sheriff from the preceding year shall become Mayor Elect, and the Mayor from the preceding year shall be designated Deputy Mayor Elect.

Procedure (in a year of ordinary elections)

The selection procedure will not take place at the end of the previous year and shall commence as soon as practicably possible following the elections.

Due to the time constraints, the period permitted for the return of nominations shall not exceed 14 days. Where there is more than one candidate, the same withdrawal and ballot process will be held. The result of the ballot shall be reported electronically to all Charter Trustees.

Standing for more than one office

No Trustee member who has been appointed to serve as an office holder in the current year may stand for election to another office in that year. Failure to withdraw all but one nomination in the permitted time will result in the automatic withdrawal of all nominations. This provision shall not apply to representation on outside bodies.

Protocol regarding the wearing of Robes and Hats

The wearing of robes is a civic tradition that dates back many years. Typically, Charter Trustees will be required to wear their robes for formal civic events including the AGM/Mayor Making Ceremony, the BCP Annual Remembrance Service and Parade and any Civic Church Services. Robes are not required to be worn to other statutory meetings of the Charter Trustees.

Women should wear their hat at all times when robed and this should be placed on top of the head, as opposed to the back of the head, so that the hat sits flat. Men should remove their hats when indoors and also when taking the salute from any formal military parade.

Annual civic events

As well as attending the Full Charter Trustee meetings, attendance is required at the following annual civic events:

Mayor Making & optional Parade – May

Annual Service of Remembrance (organised by BCP with Mayoral attendance) – second Sunday of November

Civic Service – upon Mayoral request

Other Charter Trustee events

All events funded and hosted by the Charter Trustees should have, as a guiding principle, the promotion of awareness of the Charter Trustees and the Mayoralty. Examples of such events include events designed to:

- maintain the historical and ceremonial traditions of the office of Mayor (including Beating the Sea Bounds and Beating of the Land Bounds)
- increase awareness and visibility of historic property of a ceremonial nature belonging to the Charter Trustees
- promote the town as a place to visit

- promote the town locally, nationally and internationally

Requests for support for other events will be reviewed on a case-by-case basis under the guiding principles set out above.

The Role of the Mayor

The Mayor, Deputy Mayor and Sheriff are elected from the Charter Trustee members and the positions are installed at the Annual General Meeting (Mayor-Making). After being invested with the Chain of Office and Robe, the Mayor shall be asked to take the oath of acceptance of office. The Trustees will then proceed to appoint a Deputy Mayor and Sheriff.

The position of Mayor is apolitical, serves as the ceremonial head of the historic borough and is intended to benefit both the town and its citizens. The Mayor is expected to carry out all duties in a manner appropriate to the status and tradition of the office

The Mayor's role is to:

- maintain the historical and ceremonial traditions of the office of Mayor
- represent the Trustees at ceremonial and civic events
- act as host to official visitors to the town
- promote and enhance the role of Mayoralty including by attending such community-based, cultural and charitable activities and events as the Mayor considers appropriate
- promote the town of Poole as a place to live and visit
- promote the town locally, nationally and internationally

With permission from the event organiser:

- the Deputy Mayor; or
- a former Mayor who is also a serving Trustee;

may also represent the Office of Mayor if the Mayor is unavailable or already engaged.

The Sheriff shall not attend any engagements/functions without the Mayor, except for the sole purpose of talking about or promoting the office of Sheriff.

Twinning arrangements are exclusively the responsibility of the principal authority but the Mayor may attend twinning events that satisfy the above criteria.

The Mayor also has the following responsibilities relating to the Trustees:

- to uphold and promote the purposes of the Trustee's constitution
- to preside over meetings of the Trustees and ensure meetings follow the procedures set out in the Standing Orders

- to be the conscience of the Trustees

The Mayor may nominate one or more charities for the purpose of raising their profile and encouraging donations but shall not collect or receive donations for such charities.

Precedence and Chains Protocol

ORDER OF PRECEDENCE

The Chair of BCP Council is the first citizen of the authority area, which includes Poole, and shall have precedence within that area unless a member of the Royal Family, Lord Lieutenant or High Sheriff is present. However, the role of the Chair of BCP Council is to prioritise and focus on promoting and enhancing strategic unitary-wide initiatives, hosting high profile business and political visitors who are visiting in relation to matters that do not exclusively relate to Poole and attending events with relevance to the wider BCP area. It is therefore expected that the hosting of ceremonial visitors and invitations to events that exclusively relate to Poole will be passed in the first instance to the Mayor and that the Chair, if attending as well, will defer to the Mayor.

It is anticipated that the Chair of BCP Council and Mayoral roles will complement each other but there must be close liaison between the relevant office and officeholders to ensure each role is afforded appropriate respect. On receipt of an invitation to attend an event, the receiving office shall guide the host as to the appropriate attendee or forward to the Chair or Mayor, as appropriate. If the host requests attendance from both Chair and Mayor, the invitation and request shall be passed to the appropriate attendee for them to decide whether to extend the invitation to the other dignitary.

CHAINS PROTOCOL

When the Mayor and/or Sheriff are attending an event:

- the Mayoral and Shrieval chains, being the primary symbols of those offices, should be worn unless this is impractical due to transport, security, short notice or other reasons in which case mayoral or shrieval badges on ribbons may be worn.
- if the Mayor is wearing a badge, the Sheriff should do the same unless the event solely relates to the office of Sheriff.

History – The Mayor

Mayor and “Major” derive from the same Latin word “Magnus” meaning “great”; the office of Mayor was brought to this country by the Normans as the office had existed on the continent since the 5th century. The first English Mayor was the Mayor of London, appointed in 1189 by Richard I.

Mayor of Poole

The history of the Mayor of Poole goes back to the Charter of Longspee in 1248; the first recorded Mayor of Poole was in 1422 and the Roll of Honour is on the plaques in the Council Chamber. These plaques are currently in secure storage until such time that they can be returned as per the Grade II listing of the Poole Civic Centre.

The Mayor of Poole also holds the honorary titles of:

Admiral of the Port

This title is now honorary but derives from the “Exempt Admiralty” jurisdiction when the Mayor presided over the local Admiralty Court which was abolished in 1835. The year of origin is not recorded but we know the Admiralty Courts have been held since the 13th century. The Winchelsea Certificate of 1365 is the document usually quoted as it was the acknowledgement by Winchelsea – one of the Cinque Ports and a great port of the day – of Poole’s rights which were being disputed by Wareham.

Mayor of the Staple

The Charter of King Henry VI in 1433 gave Poole its status as a Port of the Staple. Thereafter Poole had a customs jurisdiction in its own right. Previously Poole had been defined only as a “creek” and Melcombe Regis was the customs station in whose jurisdiction Poole Creek lay.

Clerk of the Market

A consumer protection officer of the period responsible for ensuring accurate “weights and measures” for all goods in the local open air markets of the day. In the past providing short measure was punishable by imprisonment or a very heavy fine!

Deputy Mayor

During the third municipal year of Civic Office, the Deputy Mayor carries the honorary title of Senior Bailiff of the Borough of Poole

History – Sheriff

The name Sheriff comes from the old English “Shire Reeve” who was the King’s representative in the County (Shire). In ancient times the Sheriff had responsibility for the administration of justice, the collection of taxes, seizing the property of debtors, keeping the gaol, hanging criminals and even command of military force.

The office of Sheriff in Poole was created on 23 June 1568 by the Great Charter of Queen Elizabeth I, which made Poole a County Corporate, in deed and name, distinct and separate from the County of Dorset. Poole was the only town given this honour by the Queen. This Great Charter virtually ended any control over Poole by the Lord of the Manor. The Charter allowed the town to choose its own Mayor, Sheriff, Justices of the Peace, Recorder and Coroner. Poole was only one of 19 towns that had the right to elect a Sheriff. Today there are only 15 Sheriffs in the whole of England and Wales.

The duties and responsibilities of the Sheriff today are not as onerous as in the past. The title of Sheriff became purely honorary as a result of the Local Government Act 1972, which reorganised Local Government from 1974 onwards. Poole, at this time, asked if it could keep its “Borough” status and retain its historic titles and privileges within the district of Poole. This was granted and the “Charter of Queen Elizabeth II” was granted on 1 April 1974, including the honorary title of Sheriff. At the Annual Council meeting each year, the Sheriff is presented with a key, symbolically representing the past duty as Keeper of the Town Gaol, and he/she is also given a staff or wand surmounted with a crown, signifying the former connection with the Monarch. The chain of office dates from the 1880’s and has been gradually built up to its present length of 37 links. It is believed that Poole is unique in that the two charters of Queen Elizabeth I and Queen Elizabeth II gave Poole the right to have a Sheriff. The Roll of Honour goes back to 1568 and is shown on the plaques in the Cattistock Room.

Today the Sheriff’s role is almost entirely ceremonial, acting as a support to the Mayor and Deputy Mayor when carrying out their civic duties and responsibilities.

The Coat of Arms

The first Coat of Arms was a confirmation by Clarencieux, King at Arms, in approximately 1563. It dated back to a seal of the late 1300s and so predated the setting up of the College of Heralds in 1484 and also the order of King Henry V in 1417, which forbade the bearing of arms without authority from the Crown. It was in 1948 that a written description of the Arm was confirmed but the College of Arms; clarifying the many variations in the colouring of the Blazon, authorising the Crest and incorporating a mermaid which had been used without authority for about 200 years.

The wavy bars (black and gold) typified water and the dolphins “the king of the sea”, just as the lion represents “king of the beasts”. The dolphin reminds us of past and present customs i.e. Maritime activity.

The three scallop shells derive from the emblem of St James and remind us that St James is the Patron Saint of the Parish Church, Old Town Poole. The scallop shell was the badge of the pilgrim and crusader. On the Poole Coat of Arms it may be an allusion to William Longspee, Lord of the Manor, who was a gallant knight and crusader who gave Poole its first Charter in 1248. The pellet (or ogress) in the mermaid’s left hand may represent a canon ball and in the right a cable and anchor which calls to mind Poole’s maritime past.

The present Coat of Arms now has two supporters. This addition was granted by the College of Arms in 1976 and described in Heraldic terms as follows: “on the Dexter a lion holding a sword erect proper and on the Sinister a dragon supporting an oar argent upon a compartment per pale a grassy mound proper and water barry wavy azure and argent”. (Dexter means right, Sinister left; the custom of Heraldry is to speak out from the page and thus the Sinister supporter appears not on the left, but on the right, as one looks at the Coat of Arms). The supporters added to the Arms was a gift to the town by Lord Murton of Lindisfarne, the then Rt Hon Oscar Murton OBE TD JP MP, Deputy Speaker of the House of Commons, to commemorate his period of service as a Councillor and MP for Poole from 1964.

The motto – “Ad Morem Ville De Poole” means “According to the Custom of the Town of Poole”.

The Coat of Arms was transferred into the ownership of the Charter Trustees by way of a Royal Warrant signed by Queen Elizabeth II on 14 August 2020.

Poole Charter Trustee Flag



Civic team - Contacts

If you wish to contact a member of the Civic Team please use the methods below:

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DRAFT

- Amended June 2025