

CGI Rules of Engagement

These rules have been developed to underpin the CGI's Code of Conduct and ensure that the activities of independent CGI Chapters are mutually reinforcing, around a common CGI core.

All Chapters are required to play by the rules in this collaborative effort to achieve the mission to promote the implementation of effective climate governance, as set out in the [CGI Charter](#).

Our rules of engagement are:

1. Becoming an Established Chapter

Prospective Chapters will go through a series of Phases during their development. During this time Chapters will be in regular communication with the Secretariat team and are encouraged to follow the process outlined in Appendix 1.

2. Stay in touch with opportunities to collaborate and exchange

Communication across the CGI network is through the Secretariat, which shares information that is of relevance to the global network on for example Chapters' events and content. The Secretariat also acts as the central co-ordination point between the Chapters, the CGI's governance bodies and the World Economic Forum.

All Chapter meetings - Chapter Leads and team members are invited to attend an All Chapter meeting every 2 months once they have reached Phase 2 in their development. The purpose of these is to foster collaboration, consult on key issues, share knowledge and exchange best practice. The meetings enable Chapters to identify matters that need further discussion by the Governing Board; as well as enabling the Governing Board to communicate information to the Chapters.

Dates for All Chapter meetings are shared well in advance. Chapter Leads unable to attend are asked to send a representative if unable to attend, or to send apologies to the Secretariat.

Chapter updates - Established Chapters are invited to update others on their activities by sharing their news, highlights and priorities in advance of All Chapter calls. Specifically, there is a requirement to provide information on membership, events and content development.

3. Make appropriate reference to the relationship with the World Economic Forum

The World Economic Forum initiated and set up the Climate Governance Initiative (CGI) in 2019 in collaboration with a number of partners, following its publication of the [Principles for Effective Climate Governance](#). The World Economic Forum has an MOU with the Centre for Climate Engagement at Hughes Hall, University of Cambridge, which

acts as the “host” and Secretariat of the CGI, in collaboration with the World Economic Forum.

Guidance on communicating the relationship of a Chapter with the World Economic Forum - In all communications with third parties, Chapters can claim an association with the CGI, which in turn collaborates with the World Economic Forum. No direct relationship exists between the Chapters and the World Economic Forum and therefore this cannot be communicated to any party. The Climate Governance Initiative should not be referred to as ‘*the World Economic Forum’s Climate Governance Initiative*’; rather the CGI is a project in collaboration with the World Economic Forum and should be referred to as such. Each Chapter is ‘*a/the XX Chapter of the Climate Governance Initiative, a project in collaboration with the World Economic Forum*’.

World Economic Forum initiatives are a collaborative effort. The World Economic Forum does not acknowledge the concept of a Founder for its initiatives.

4. Obtain appropriate permissions for using respective names and logos

Neither the Chapters, CGI nor the World Economic Forum will use the name and/or logo of the other organisation without that organisation’s written approval of form, content, and context.

Use of the World Economic Forum’s logo for content generated by the CGI or its Chapters is not permitted; neither is reference to the CGI as the ‘WEF’s Climate Governance Initiative’.

The use of the CGI name and logo must comply with the [CGI branding guidelines](#), as drawn up by the Climate Governance Initiative.

5. Be mindful and transparent about any charging and fundraising

Charging – The underlying principle is to make the CGI and its materials as widely accessible as possible. CGI materials and events are free for all Chapters and their members. In the spirit of increasing and accelerating awareness of effective climate governance, Chapters are also expected to offer materials and events free of charge to their members as far as possible. We acknowledge that Chapters need to raise funds and Chapters are required to be transparent where there is a fee for access to materials and events. Unreasonable costs for materials and events and disproportionate charging (e.g. Chapters providing minimal/no materials or events free of charge) will be considered a breach of the Rules of Engagement. A list of “do’s and don’ts’ with this regard is listed below to provide guidance with this respect.

Fundraising – Chapters, the World Economic Forum and the CGI Secretariat are entitled to raise funds as appropriate in support of reaching the objectives of the Charter. However, accepting funding, payment or gifts in return for providing profile, advertising or networking benefits that are not in line with the Charter will be considered a breach of the Rules of Engagement, (for example taking payment from a company for a speaking opportunity, when that company is not considered a climate leader). Chapters are expected to disclose their sources of funding, including that in-kind, to the CGI Governing Board and on their Chapter website.

In seeking funds/in-kind support

Do:

- Consider the integrity of the CGI and brand association;
- Stay close to the principle of sharing best practice and keeping materials accessible;
- For membership organisations, provide transparency on what is part of the membership fee and what is open to all for free.

Don't:

- Allow greenwashing;
- Charge for materials other Chapters are providing for free and/or are the result of pro bono partnerships of others;
- Accept funding, payment or in-kind support in return for providing profile, advertising or networking benefits that are not in line with the Charter or spirit of the CGI.

Key questions for consideration

- Is the relationship and association in the Chapter's/ CGI's best interests, including its public image and reputation?
- Does the relationship and brand association contribute to achieving the mission and purpose of the CGI?
- What are the net zero commitments and plans of the donor company/organisation?
- Will the Chapter remain actively in charge of how its funds and resources are spent in line with its purpose?
- What are the benefits that individuals, companies or other funders get, and are there any risks – e.g. brand association? expectations around support or impact?

If in doubt, please raise your query with the governance committee via the Secretariat.

6. Keep the CGI spirit at the heart of events co-organised with other Chapters

Events co-organised by Chapters must:

- maintain the spirit of the CGI, with its focus on Non-Executive Directors, the defining feature of the CGI's approach;
- avoid greenwashing and mitigate for other reputational risk;
- feature an appropriate diversity of speakers, reflecting the diverse nature of the CGI;
- seek relevant permissions (eg speaker photographs, quotations, copyrights)
- have the appropriate sign-off for press releases and social media posts, in liaison with the Secretariat CGI team and the World Economic Forum;
- be recorded (where possible) and shared with fellow Chapters, via the Secretariat.

7. Keep the collaborative spirit at the centre of cross-border relationships

Go through the relevant Chapter Lead(s) to reach out to contacts based in a country outside your own Chapter (e.g. a company or a speaker for an event). Make sure approaches are joined up, keeping the relevant Chapter(s) in the loop as appropriate.

Review of the Rules of Engagement

These Rules of Engagement will be under regular review by the Governing Board, particularly in view of the CGI's early stages of development. Changes of substance will be flagged with the Chapters and a meeting may be called by the Chapters in the event that one third of established Chapters or more disagree, as set out in the Governance Structure document.

APPENDIX 1:

Phases of new chapter development and operation

The objective of this document is to outline the five phases of a chapter's journey to achieving and retaining 'established' status, including the conditions for progression to each next phase and the rights and responsibilities under each. The CGI team members involved in each stage have been identified in the last column along with the available resources.

Phases	Objective	Conditions for progression	Access to:
1: Concept and introduction ~2 months	Share business case for involvement in the CGI to secure agreement to lead the development of a new chapter. Typically involves a presentation to a NED or host organisation.	Go/no go decision communicated within 2 months of introductory meeting with CGI.	CGI Overview Presentation Principles for Effective Climate Governance CGI Charter Overview doc: Vision, Mission, Achievements Existing materials which established chapters have used during the early stages of their development, and guidance from CGI. Discussions with chapter leads.
2: Definition and planning ~6 months	Drive the Chapter forward, build the governance and decide organisational structure.	Gather a working group by bringing in some NEDs and or corporate participants, including a suitable Host Organisation . Together; <ul style="list-style-type: none"> - Identify a group of Patrons Chairs - Identify a group of Founding NEDs (the steering committee and/or board) - Identify Partners and Supporters (who are prepared to provide support and produce materials) - Optional: Identify suitable individuals to serve on the Technical Advisory 	Starter Pack Secretariat on working group calls (where needed). Once majority of criteria are met, can join 'All chapter bi-monthly calls' and CGI-wide communications (access to events, etc.). CGI-wide initiatives, content and consultation response Only after all criteria met: Licence agreement and introduction to Chapter

		<p>Committee, including academia and think tanks.</p> <p>See definitions here</p>	Zero to advance licence letter discussions.
<p>3: Launch and execution</p> <p>~2 months</p>	<p>Outline the annual content plan and launch the chapter. Approve public announcements.</p>	<p>Have a webpage/site and a process to manage membership, and the formal launch that is communicated publicly, with relevant approvals.</p> <p>Have a community on TopLink (minimum of 10 representatives including the leadership of the Chapter)</p>	<p>Existing content and funding where available.</p> <p>CGI voting and right to nominate a member of the Governing Board</p> <p>Access to Toplink.</p> <p>Association and use of 'x Chapter of the CGI, a project developed in collaboration with the World Economic Forum'</p>
<p>BECOME AN ESTABLISHED CHAPTER: Sign Charter, Code of Conduct and Rules of Engagement (and Chapter Zero licence agreement where necessary)</p>			
<p>4: Driving Impact</p> <p>~ongoing</p>	<p>Exchange and contribute to content, and engage with influencers and experts.</p> <p>Join All Chapter calls and participate in the CGI community</p>	<p>Take the lead on content development and share with other chapters. Typically, two types of content can be developed; i) new subjects and research, and ii) translation/adaptation of existing content.</p> <p>Where applicable, share CGI-led surveys with members.</p> <p>Have a dedicated social media account.</p> <p>~within 3 months of launch</p> <p>Build network of experts and influencers to support the Chapter's content and contribute to CGI-consultations, etc.</p> <p>Volunteer operational support (where possible).</p> <p>Support chapter development in complementary countries or regions (where possible and relevant).</p>	<p>Opportunities to participate in and contribute speakers to global events, where available.</p>

5: Evaluation and Self-improvement ~ongoing	Provide regular updates to the Secretariat in relation to members, events and content	Provide satisfactory evidence that the Chapter is following the Charter, Code of Conduct and Rules of Engagement	Continued involvement in the CGI and use of Chapter Zero logo (where applicable). Concerns over any breaches escalated to the Governing Board
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APPENDIX 2:

Checklist for new Chapters	
Have you been given an overview of...?	Yes, completed
The Secretariat's role	
The CGI's current priorities	
The partnership between the CGI and the World Economic Forum	
Have you received...?	
Link to the CGI website	
Access to the CGI's Google Drive, which includes meeting agendas, minutes and supporting documentation	
Access to the minutes of the most recent All Chapter and Governing Board meetings	
Dates for future All Chapter meetings	
Have you sent...?	
Your Chapter's name and logo, for inclusion on the CGI website and on your TopLink community page	
Permission for your details to be added to the Chapter Directory on the Google Drive, so Chapters can contact you individually	
A list of contacts from your Chapter to be included in the All Chapter meetings, regular communications and/or communications about events being run by fellow Chapters.	
Have you read and understood...?	
The CGI Charter	
The CGI's Code of Conduct	
The CGI's Rules of Engagement	

Please complete the checklist, sign below and return it to the Secretariat at cgisecretariat@hughes.cam.ac.uk.

I, *[name of signatory]* with authority to represent *[name of Chapter]* agree to the CGI Charter, Chapter Code of Conduct and Rules of Engagement.

Signed by:

Date:

Assuming the Secretariat is satisfied that you have met all the criteria in Phases 1-3 of the Chapter development process on receiving this form, you will receive confirmation of becoming an Established Chapter and will receive the benefits of this status.