



## Leads Group Policies & Procedures Effective: 1/2023

### **1 Introduction**

The Leads Group program is administered by GFW Inc. for GFW Inc. members. These Leads Groups allow for members of GFW Inc. to get more out of their membership by offering the chance to connect and do business with fellow GFW Inc. members. Leads Groups are open to active GFW Inc. member/investor companies. Individuals or organizations that are not members/investors of GFW Inc. will not be allowed to join Leads Groups.

Leads Groups are designed to create a spirit of collaboration and commerce between all participants. Participants are expected to openly pass business among members of their group. In order to create an environment of trust and transparency, membership in Leads Groups is limited to one member per industry.

### **2 Visiting Leads Groups**

Anyone interested in visiting a leads group may visit any Leads Group twice (limit two Leads Groups) before making a commitment. Visitors to Leads Groups are not required to be a GFW Inc. member/investor to visit. Visitors to Leads Groups are encouraged to determine if the group is a right fit for them and if they are willing to commit to attend in accordance with the attendance policy.

### **3 Eligibility for Leads Groups**

#### **3.1 Current GFW Inc. Members/Investors**

All GFW Inc. members/investors in good standing are eligible to join a Leads Group given their specific industry is not already represented within the group.

#### **3.2 Future GFW Inc. Members/Investors**

If a non-member visitor wants to join a Leads Group, they must become a member/investor of GFW Inc. For the sake of simplicity, non-member visitors may choose to apply for a GFW Inc. membership and Leads Group membership at the same time. However, it's important to note that eligibility for the Leads Group is contingent on acceptance to GFW Inc.

#### **3.3 Multiple Groups**

Organizations who are members of GFW Inc. may have an employee join each Leads Group given their industry is not already represented. However, individuals participating in Leads Groups are limited to membership in two groups.



### **3.4 Ineligible Organizations**

Individuals who are current participants in a Leads Group may only remain a member of that group if their company is an active GFW Inc. member/ investor company. If an individual's company discontinues membership or is dropped as a member of GFW Inc., all individuals participating in a Leads Group from that company will be removed immediately from their respective groups and may not continue to participate in meetings until company membership is reinstated.

## **4 Joining**

### **4.1 Applications**

Visitors to Leads Groups complete the online application on the GFW Inc. On the application, visitors should indicate their top two choices of groups along with their related industry to ensure they are indeed eligible to join.

Applications for Leads Groups are submitted [online](#) via the GFW Inc. website. All applications are reviewed by GFW Inc. staff to ensure general eligibility to join a Leads Group (i.e., member/investor in good standing with GFW Inc., and industry slot availability). Once the initial review is completed, the application is forwarded to the Leads Group chair to share with the selected group for member voting.

### **4.2 Voting**

Acceptance of new members into Leads Groups is completed by vote. Voting is overseen by the group chair. The group chair may wish to provide group members with relevant background information on the applicant so the group may make an informed decision. Relevant information may be defined as the applicant's application (provided any sensitive personal information is removed) or other pertinent information.

A vote may take place in person if simple majority of the group is present. A simple majority is defined as half of the group's members plus one. If a simple majority isn't present, the chair may wish to hold a vote via email. In either case, the vote must remain confidential and anonymous. If in person, the applicant is asked to leave the room. If via email, the chair is responsible for keeping the vote anonymous. Majority vote determines acceptance of an applicant to the group.

## **5 Fees**

The fee for leads group participation is \$50 per year, due each January. New Leads Groups members must pay their dues immediately upon acceptance to the group. Proration of fees may only be applicable for the fourth quarter of the year, at the discretion of GFW Inc. staff.



## **6 Attendance**

### **6.1 Attendance Requirements**

Regular attendance to Leads Groups is imperative to growing and building relationships within the group. All Leads Group members are strongly encouraged make Leads Group meetings a priority. Given that the core purpose of the Leads Group is meant to show up and build relationships within the group, the guideline for expected attendance average of 75% attendance of meetings across a year. In other words, since Leads Groups meet twice a month, there are 24 total meetings per year; adherence to this guideline means that Leads Groups members may not miss more six meetings in the span of a year.

While this is a suggested guideline, it is up to the members of each Leads Group and ultimately the group chair to hold a vote to determine whether or not a member with attendance issues may continue in the group.

If a group member is unable to make the scheduled meeting, they should let the chair or other leadership team member know as soon as possible.

### **6.2 Medical or Emergency Exemptions**

GFW Inc. and Leads Groups wish to ensure a safe and healthy environment for all participants. As part of this commitment, it is understandable that members (or their family members) may face serious illness, hospitalization, or other serious personal emergency. If a member is facing such an issue, he/she may contact the leadership of their group to request an attendance exemption.

### **6.3 Leaving Leads Groups**

If a current member of a Leads Group wishes to discontinue membership, they should contact the group chair to communicate they are leaving and anticipated last meeting date. If a member chooses to leave a group in the middle of a year, no refund shall be issued for balance of the \$50 fee.

## **7 Program Structure**

Leads Groups are designed for members to meet regularly, build relationships, learn about members' industry expertise. Meetings will be held on a semi-monthly basis. Groups may not exceed 25 participants, including officers, and only one member from each business category may join. Members may only represent the primary business that maintains the membership in the Leads Group.

### **7.1 Meeting Locations**

GFW Inc. Leads Groups can meet at any location convenient to the group members. Leads Groups may choose to meet at GFW Inc. offices during business hours. Groups choosing to



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meet at GFW Inc. offices must reserve their rooms through the office coordinator. Leads Groups members are responsible for their own meals, parking, and other expenses incurred.

## **7.2 Officers**

Each Leads Group is run by a chair and secretary elected to the group. The chair or vice chair will be responsible for reminding group members of the next meeting date, keeping attendance, updating rosters with a GFW Inc. representative, tracking leads, and reporting closed leads.

Leads Group officer elections will be held during the fourth quarter of each year for a one-year term the following calendar year. Elections will be for chairperson, vice chair, and secretary (optional). GFW Inc. staff will send out a communication for nominations of officers in each group. Members will submit their nomination for each officer position within the group. GFW Inc. staff will then contact nominees to gauge interest. Interested nominees will be placed on a ballot for group members to vote confidentially. Simple majority (half plus one or the most votes in general) votes elects officers to each Leads Group. GFW Inc. staff then communicates the results of the election to the group.

In some cases, Leads Groups may choose to elect additional leadership roles. If additional officers are requested, this will need to be communicated with GFW Inc. ahead of the election process.

## **7.3 GFW Inc. Spotlight**

GFW Inc. administers Leads Groups to foster a sense of community and allow members distinct advantages to grow their businesses. It's important to ensure upcoming GFW Inc. events are communicated in each meeting. The expectation is that each Leads Group meeting should start with a 5-minute GFW Inc. spotlight highlighting upcoming events. Discussing events at Leads Groups helps to bring awareness of additional GFW Inc. benefits but also gives a chance for members to coordinate attendance together, if interested.

## **7.4 Sharing and Tracking Leads**

Leads, referrals, and subsequent closed business by Leads Groups is tracked by officers. These statistics must be reported to GFW Inc. as a condition of sponsorship. GFW Inc. uses these statistics to reflect the economic impact of Leads Groups and the organization at large.

## **7.5 In the Meeting**

Leads Group meetings are overseen by the chair or other officer. The purpose of the group is to understand other members' needs and be able to refer accordingly. The suggested format involves members sharing a short commercial or update regarding their business, and a regular spotlight for members to provide a more in depth look at their business, themselves, and other



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relevant information. However, the ultimate format of the group meetings is determined by group officers.

## 7.6 Cancellation of Meetings

Leads Groups may be cancelled due to inclement weather or holidays. In the event of a closure of GFW Inc. offices, a staff member will notify the chairs of any Leads Groups meeting in GFW Inc. space, who is then responsible for notifying the group. In the event of closures due to weather conditions at locations outside of GFW Inc. offices, the determination of closure shall be made by group officers.

## 8 Professional Code of Conduct

Members are responsible for monitoring ethical or non-ethical activities and how they affect the group. The group is responsible for its members' behavior and professionalism. Participants may be voted out of the group or removed by a GFW Inc. staff member at any time for unethical/unprofessional activities.

## 9 Conclusion and Acknowledgement

I, the undersigned, acknowledge that I have received a copy of the Leads Group Policies and Procedures. I also understand that the Leads Group Policies and Procedures are subject to change at the discretion of the Leads Group officers and GFW Inc. representatives.

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Printed Name

Signature

Date

For any questions or concerns please contact:

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