



Leads Group Policies & Procedures (updated 4/2021)

NEW LEADS GROUP PARTICIPANT: MEMBERSHIP, VISITATION, AND APPLICATION PROCESS

GFW Inc. Leads Groups are open to active GFW Inc. member companies ONLY. Individuals may not be voted into/remain in a Leads Group as a participant if their company is not an active GFW Inc. member/investor company.

1. Individuals employed at a company that IS an active GFW Inc. member and would like to visit/join a Leads Group...

- Must apply to visit a Leads Group [online](#).
- Individuals are permitted to visit a maximum of TWO (2) separate meetings between all active Leads Groups with an opening for their specialty/category in the calendar year (January to December) before vote is required for official membership in that group.
- To continue participation in any Leads Group after the maximum two visits, the participant must be voted into that Leads Group with a majority vote.
- Once a participant has been voted into a Leads Group, the chair will notify the GFW Inc. director of investor engagement and the newly elected participant will be billed their first-year fee of \$60.00 to participate in that group.
- Once payment has been received, the participant will be considered an official member of that Leads Group and their company information will be added to the official GFW Inc. [Leads Groups Master Roster](#) online.
- GFW Inc. staff will strictly enforce that participants CANNOT visit/join Leads Groups where the above process is not followed or completed.

2. Individuals employed at a company that IS NOT an active GFW Inc. member and would like to visit/join a Leads Group...

- Must at minimum have an application for GFW Inc. membership on file. Apply online at join.gfwinc.com. Payment is NOT required with this application at this time.
- Must apply to visit a Leads Group [online](#).
- Individuals are permitted to visit a maximum of TWO (2) separate meetings between all active Leads Groups with an opening for their specialty/ category in the calendar year (January to December) before vote is required for official membership in that group.
- To continue participation in any Leads Group after the maximum two visits, the participant must be voted into that Leads Group with a majority vote.
- Once a participant has been voted into a Leads Group, the chair will notify the GFW Inc. director of investor engagement and the newly elected participant will be billed their first-year fee of \$60.00 AND be billed their company's GFW inc. new membership dues to participate in that group.
- Once payment has been received, the participant will be considered an official member of that Leads Group and their company information will be added to the official GFW Inc. [Leads Groups Master Roster](#) online.
- GFW Inc. staff will strictly enforce that participants CANNOT visit/join Leads Groups where the above process is not followed or completed.



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CURRENT LEADS GROUP PARTICIPANTS: MEMBERSHIP, VISITATION, AND APPLICATION PROCESS

- 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.
- After their first year of participation in a Leads Group, participants will be billed once during the calendar year \$35.00 for each group they participate in.
- An individual participant may be in a maximum of TWO (2) Leads Groups, but a company can have up to ONE (1) participant in all active Leads Groups. Current participants who would like to join a second group or have other company representatives join other groups must follow the procedures in Part 1 of the previous page.

Attendance

- The attendance requirement may vary between each group and is up to the discretion of the Leads Group Chair; however, it is expected that all participants maintain at least 75-80% meeting attendance in order to maintain their status in the group.
- Participants are required to notify their chair in advance if they are unable to make a meeting; excused and unexcused absences will count toward attendance requirements. If a participant knows in advance that they cannot attend a Leads Group meeting(s), they are asked to send a substitute in their place, notifying the chair in advance.
- Should a participant have repeated issues with attendance, a GFW Inc. staff or the Leads Group officer may vote the individual out of the group or ask them to step down.

Program Structure

- Each Leads Group will elect officers. An officer election 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. Officers can hold their positions for a maximum of two terms. Leads Groups do not have to fill all the officer roles and may add additional roles as needed.
- Each individual chair or secretary 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.
- Officers may be removed from their positions at the discretion of a GFW Inc. staff member should any requirements of the office not be fulfilled.
- Meetings will be held on a semi-monthly basis unless scheduled meetings fall on a holiday or weather emergencies do not allow.
- One group may not exceed 25 participants, including officers.
- All attendees will pay for their own parking, lunch, and/or breakfast.
- Leads Group meetings held at the GFW Inc. office or using a GFW Inc. virtual platform may only be between the hours of 7:45 a.m. and 4:45 p.m. Monday-Thursday and 7:45 a.m. and 2:45 p.m. Friday.
- Members may only represent the primary business that maintains the membership in the Leads Group.
- Leads Groups should only use members of the groups or GFW Inc. investors for services, meeting locations, charitable contributions, etc.



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METRO CHAMBER ALLIANCE

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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.

Leads Group Policies and Procedures are subject to change at the discretion of the Leads Group officers and GFW Inc. representatives. If you have any questions or concerns, please contact:

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