

ASSOCIATION OF ESD PROFESSIONALS MAY 2022

EMPOWERING MEMBERS TO EMPOWER US ALL





Message from the Executive Director



Since the 1970's, ESD professionals have been developing and growing the practice of empowerment self-defense (ESD) as a vital anti-violence tool. These leaders have created and led vibrant ESD organizations which have developed and then expanded the practice and awareness of ESD.

We believe that their work lays the foundation for what comes next—scaling up. We have created a professional, membership association that will support ESD

professionals, expand the ESD community while simultaneously bringing its members closer together, broaden the reach of ESD's healing benefits, and fortify and elevate the ESD profession as we engender public trust.

Mission

It is the mission of the Association to support ESD professionals, foster communication and collaboration, elevate the ESD profession, and expand the reach of ESD to better enable individuals and organizations to achieve shared violence-prevention goals.

The Association is empowering members to empower us all. Together, we can change the world.

Vision

To dramatically reduce inter-personal violence around the world, it is the vision of the Association to magnify and support the efforts of ESD professionals to bring empowerment self-defense to millions more people around the world. The ESD community is dramatically expanding the pool of instructors, advocates, researchers, & more; this rapid growth means that there is a quickly growing number of ESD professionals who need support, funding, resources, and networking opportunities. The profession itself, being so new and not well known yet, has begun to educate the public about empowerment self-defense and how effectively it prevents violence, but a professional association can multiply these efforts many times. The profession also needs to earn the respect of governments and the public in the United States and in countries around the globe if it is going to achieve success when it



lobbies for public policy changes, government funding, and support for ESD programming. The Association can help with all of this, can help to make ESD recognizable everywhere.

The Association will provide a host of benefits, including: online networking opportunities as well as virtual and in-person events; individual and organization features in Association publications and podcasts and at events; online resources, including access to self-defense liability insurance, a jobs board, How-Tos, grant opportunities, and many more resources to support members and make the business side of ESD practice less burdensome; credentialing, continuing education, and accreditation programs backed by a strong code of ethics to formalize standards and raise ESD's profile; advocacy, lobbying, and public education to influence public policy and increase government funding; and the promotion of research that repeatedly demonstrates ESD's efficacy.

The Association aims to help ESD professionals empower youth and adults all over the world. We aim to help ESD professionals prevent violence. We aim to give voice to ESD professionals and the people they teach. We aim to help individuals and organizations practicing and advocating for ESD to achieve justice for those who dare to use their voices, stand tall, and defend themselves.

Core Values

The core values of safety, dignity, and empowerment guide ESD professionals in our practice of selfdefense. Through our practice, we strive to be inclusive and welcoming, to encourage diversity in the profession, and to make ESD and the Association's programs accessible and empowering. ESD professionals celebrate and welcome diverse individual & cultural narratives with hope and a fierce commitment to overcoming violence throughout the world.

The conduct of ESD professionals carries widespread and interdependent implications. Whether we are actively teaching or we are researching, writing, advocating, or practicing in another manner, we maintain a commitment to ethical conduct and awareness, believing that even the appearance of impropriety may harm students as well as the standing of ESD professionals and the profession. Therefore, ESD professionals strive to abide by the boundaries and guidelines outlined in the Association of ESD Professionals Ethics Code, which can be found on the <u>Association website</u>.



Why the Association Was Created

In order to broaden the reach of ESD, the ESD profession has been growing like never before. New organizations and programs are being created all the time, bringing ESD to more people around the world. ESD is making its way to people everywhere with more instructors (thanks to increased instructor-training), through ESD college majors, and with ESD classes sponsored by corporations, schools, universities, teams, and other institutions. And people everywhere are learning about the benefits of ESD for their personal empowerment and defense. This rapid growth means that there are large numbers of people who are new to ESD as instructors, entrepreneurs, researchers, volunteers, and more. These ESD professionals could make good use of an organization that provides support, facilitates networking, and engenders public trust in the ESD profession and its professionals.

Associations act as neutral certifying bodies that screen the professionals they represent through credentialing exams. The exams provide an impartial and fair method for determining adherence to ESD principles, competence, ethics, and the ability to protect and care for students and to practice in a truly inclusive manner. Associations also provide support to their members through a variety of resources. And associations provide networking opportunities to their members, including in-person and online events, webinars, and online community platforms, bringing the people of a growing professional closer together. Associations lobby governments and run grassroots advocacy campaigns to achieve big-picture objectives for their members without the limits imposed on 501(c)(3) organizations. The Association of ESD Professionals intends to fill these needs for ESD professionals.

Summary

The Association is here to help. We want to provide resources, programs, and features for ESD professionals to make their lives easier. We aim to help practitioners with the business-side of practicing ESD so that they can focus on doing what they do best, empowering millions of adults, youth, and children to protect themselves and live their best lives with confidence. We welcome everyone working in the ESD profession whether instructor, instructor-trainer, staff, organization leader, entrepreneur, volunteer, researcher, writer, or advocate. We welcome the people working in the violence-prevention arena who believe in the principles of ESD. We welcome those who may not be



familiar with ESD but want to learn more. We welcome people from all over the world, of every background. And although ESD grew out of women's self-defense and will always fight for women's empowerment and equality, as will the Association, we welcome boys, men, and people of every gender too.

What follows is the Association's strategic plan for the next few years. It outlines what we hope to achieve and how we hope to achieve it.

Samantha Waterman Executive Director, Association of ESD Professionals





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2. The Plan

Focus Areas

The Association of ESD Professionals is focusing on the following goals.

- A. Create and seat restorative justice commission.
- B. Develop Credentialing Program and Exam.
- C. Develop Continuing Education and Accreditation Programs.
- D. Design and plan Advocacy & Lobbying Program.
- E. Foster community through online networking and events and through rebranding and other improvements to website and social media.
- F. Provide helpful resources to support members with careers and businesses.
- G. Support ESD research projects, encourage new ESD research, and bolster real-world impact of ESD research.
- H. Make the Association accessible to all through discounts and an Association foundation.

Strategic Objectives

A. Ethics and Restorative Justice.

To build public trust, the Association has created a Code of Ethics and will soon be creating a member "commission" to address grievances and claims of ethical violations using a restorative justice framework.

B. Credentialing & Continuing Education Program.

To more comprehensively standardize the instruction and practice of ESD, the Association is developing a Credentialing Program which we hope to launch summer 2022. To further elevate ESD as a profession and build public trust, the Association will create and manage a Continuing Education and Accreditation Program. Development of these will begin late summer or fall 2022 and go into operation in 2023.





C. Advocacy & Lobbying Program.

To expand the reach of ESD, grow public awareness, enhance its reputation with governments and the public, influence public policy, and increase funding for ESD, the Association will develop a collaborative Advocacy & Lobbying Program. We will develop this program beginning fall 2022, hoping to launch it at the beginning of 2023.

D. Fostering Community.

To foster networking and cooperation, the Association is and will be hosting and providing networking opportunities through an online community, Association events, an ESD directory, a master calendar of ESD and violence-prevention events, and a newsletter, online magazine with content from members, and podcast. We have begun communications and online events, and will be rebranding and relaunching a new and improved website, membership portal, and social media this summer 2022.

E. Resources to Support Members.

To support ESD professionals in their work and advancement, the Association is providing career & business support through a jobs board, access to selfdefense liability insurance, and how-tos about the business-side of ESD practice. The Association will increase the resources it is providing in volume and will add to the resources currently provided with things like lists of



grants and other funding sources, a schedule of regional ESD fees, recently published research, research opportunities, ESD news, and more. New resources are coming this summer 2022 and beyond. In addition, we will support research projects. We started with the Measurements Report and the We Are Worth Defending pilot project. We hope to launch the Finding ESD project in 2023. Finally, we would like to create an online resource library.

F. Making the Association Accessible.

To make the Association more accessible and to support financial empowerment, we offer discounts and international tiered pricing. The discounts and international tiered pricing are currently available. We also hope to create a subsidiary 501(c)(3) foundation to provide financial support for ESD scholarships and research. The foundation will be created in 2024 or 2025, depending on our available resources.





G. Self-Sufficiency.

In an effort to become a self-sufficient organization no longer dependent on the loans we receive from our generous patron (Yudit Zicklin Sidikman), we will focus on generating revenue in several ways, such as: 1) increasing membership and membership dues, 2) creating successful credentialing program with its exam fees and fees for study materials, 3) hosting an annual conference beginning in April 2023 and possibly additional smaller events, 4) sponsorships (events, podcast, magazine, and website/membership portal), and

5) subscriptions to Association-created resources.

Programs and Projects

In this section, we will go into more detail about the strategic objectives listed above.

Ethics and Restorative Justice

Code of Ethics

To build public trust, the Association has created a Code of Ethics. It can be found on the <u>Association</u> <u>website</u>.

Restorative Justice "Commission"

The Board will soon be creating a "commission" to address grievances and claims of ethical violations using a restorative justice framework. The group will be comprised of Association members and will exclude Board members and Association staff. The Board Ethics Committee is currently working on the restorative justice framework after which the Board will create the "commission." We hope to complete this process fall 2022.

Credentialing & Continuing Education Program

The Credentialing Program has been under development since incorporation in February 2021. Sheila Watson is leading the effort. We have convened an advisory council and have reached out to ESD professionals from all over the world to get







feedback from the ESD community, incorporating many suggestions into the program. We have prepared the first credentialing exams and have convened a group of ESD experts (with various types and levels of experience) to review the exam through a multi-step process (what will become the Council of Experts). We will soon be asking the group to review the exam one more time and then take the exam. Meanwhile, we are preparing an exam handbook, a glossary of ESD terms, and the application. We hope to offer the first exam this summer in early August after the NWMAF conference and a second exam this December 2022.

Beginning this fall, we will begin to develop the Continuing Education and Accreditation Program. Through these programs, credential renewal (every three years) will require the submission of continuing education credits. To earn these credits, credential renewal candidates will take ESD continuing education courses from worldwide qualifying providers. We hope to have these programs established and to start qualifying providers winter 2023.

Advocacy & Lobbying Program

Objectives

- 1. Change public policy by lobbying for new laws and changes to existing laws in the United States at the federal, state, and sometimes city levels.
- 2. Lobby for increased government funding for ESD organizations and programs (i.e., through VAWA).
- 3. Use grassroots campaigns to educate the public about ESD in the U.S. and around the world.
- 4. Use grassroots campaigns to influence governments and international NGOs to provide funding for ESD.
- 5. Partner with and join international non-violence organizations (non-profits, NGOs, etc.) and government entities in their grassroots campaigns for violence prevention and victim support.

We will create and develop this program beginning fall 2022. We will reach out to the greater ESD community for input on policy, advocacy, and lobbying goals and priorities. We hope to launch at the





beginning of 2023, and while we can start collaborative grassroots campaigns at that time, the availability of funding will dictate when we are able to begin lobbying.

Fostering Community & Featuring Members

Networking is one of the most important functions of the Association. We want to help ESD professionals learn about other ESD organizations, meet new colleagues, collaborate, and forge new friendships. In addition, we want to honor members with awards and other recognitions through our newsletter, blog, magazine, and at the annual conference and other events.



References to ESD professionals is intended to refer to ESD professionals all over the world.

- 1. Introduce ESD professionals to one another.
- 2. Make ESD professionals aware of others practicing ESD outside their professional/social circles.
- 3. Foster communication among ESD professionals.
- 4. Encourage collaborations among ESD professionals.
- 5. Stimulate conversations among ESD professionals.
- 6. Showcase and honor the work, stories, accomplishments, and art of ESD professionals and especially Association members.

We will accomplish these objectives with the following:



• Online Networking. Portal for members exists but will be upgraded for greater userfriendliness and to put networking features front and center for members. Coming later this spring 2022.



Events. Online and in-person events. Online events have begun; improvements and better promotion of online events coming soon; annual conference April 2023 (in-person); additional in-person events will be added, planning to begin summer 2022.



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• Website. Current website will be upgraded with new branding to exhibit a warmer, more welcoming feel and a more vibrant and engaging interface. Coming early summer 2022.



- Social Media. New social media posts will also have our new branding (see above) and new messaging. Coming this spring 2022.
- **Podcast.** Podcast will be hosted by the Executive Director and will feature table discussions of ESD topics and interviews of ESD professionals including Board directors, Association



D topics and interviews of ESD professionals including Board directors, Association members, and members of ESD community. It will be dynamic, inspirational, and
more solution-oriented than philosophical. It will showcase the work and stories of Association members. Board members will be invited to participate. Coming summer 2022.

 Magazine. Online magazine will feature content from ESD professionals including articles, creative writing, research, art, and music. It will celebrate Association members and their accomplishments, including Board members. It will also include ESD news, advocacy updates, and articles about ESD produced by Association staff. Coming fall 2022.

Resources for Members

Resources will focus on supporting ESD professionals in their careers and business ventures, from starting new ESD practices to forming new ESD nonprofit organizations to expanding existing practices to finding ESD-related events, funding, and research opportunities. The resources we currently expect to provide members include:



- Career Center. The career center features a jobs board that is available to members (at a discount) and non-members. Employers pay to post a job ad, employees use it for free. This is also a revenue generator for the Association. This is currently available.
- 2. Insurance. Access to self-defense liability insurance for Association members. There is a quick and easy online application. This is currently available.

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- 3. How-Tos. How-tos about the careers and business-side of ESD practice. A few how-tos are currently available, but there are more coming. Beginning this spring or summer 2022, these will be published more regularly.
- 4. ESD Events. We will display on our website ESD and violence-prevention/non-violence conferences and summits with links to the event websites.
- 5. ESD Directory. We will produce a public-facing ESD directory for ESD class participants and ESD practitioners. This will help connect ESD professionals and will make it much easier for potential ESD class participants to find courses near them or on line.
- 6. Resource Lists (Coming Fall 2022)
 - a. Grants and Other Funding Sources
 - b. Schedule of Fees
 - c. Research Opportunities
 - d. Ongoing & Published Research
 - e. ESD Projects for Specific Audiences
 - f. Potential ESD Clientele/Market Audiences
 - g. Lists of Specialty Programs



- 7. ESD News. We will provide snippets of ESD-related news on the member side of our website. Coming summer or fall 2022.
- 8. Sponsored Research
 - a. Measurements Report from the Measurements Commission (Completed)
 - b. We Are Worth Defending from Julie Harmon in Ohio (Ongoing)
 - c. Finding ESD (Find ESD professionals worldwide, and in the process, collect information about different styles of ESD and how differences are informed by culture, color, country, language, and law influence; Dr. Jelena Nolan-Roll, Stephanie Cyr, Toby Israel, and PAVE Prevention have all expressed interest in this project.) (Early 2023)
- 9. Resource Library (Under Consideration)
- 10. Store (Under Consideration)



Subsidiary Foundation and Greater Accessibility

To make the Association accessible to all and to support financial empowerment, we offer discounts and international tiered pricing. But we would like to do more. Therefore, we propose the establishment of a subsidiary 501(c)(3) charitable



foundation to provide scholarships and support programming and research. It is most likely not possible for a subsidiary foundation to provide scholarships to directly offset membership dues and credentialing fees (such as through scholarships for those things), but we will confirm this with our lawyers. However, if the subsidiary can support research and other types of scholarships (e.g., for ESD instructor training at accredited organizations), this would relieve the 501(c)(6) from having to make those expenditures and might make it possible to expand the discounts we currently offer. Also note that creating the foundation may cost the Association some seed money (i.e., to hire a director and chief fundraiser). We hope to create the Foundation in 2024 or 2025.

Financial Self-Sufficiency



Financial self-sufficiency is a top priority of the Association. Please see Section 4, Financial Plan and Evaluation, below.

Additional Materials

Please see Appendix A for Milestones (and a brief credentialing program timeline).

Please see Appendix B for Resources & Benefits for Members.

Please see Appendix C for About ESD.

Please see Appendix D for the KPI SMART Analysis chart.



4. Financial Plan and Evaluation

Financial Structure and Options



The Association is a 501(c)(6) nonprofit, mutual benefit professional association incorporated in Virginia. Unlike a 501(c)(3) organization, donations to the Association are not tax deductible as charitable contributions, only as business expenses. Therefore, there is no incentive to donate to 501(c)(6) associations. Like all 501(c)(6) associations, the Association of ESD Professionals will generate revenue for our operating expenses. The Association will also apply for grants, primarily from non-government sources, however likelihood of success is unclear. We are applying for one large grant this spring.

To make matters a bit more complicated, in order to maintain our tax-exempt status as a 501(c)(6) nonprofit association, how we can generate revenue is limited. For instance, any revenue generated from advertising is taxable and only a small portion of revenue can be generated this way. It used to be that professional associations survived largely on membership dues. However, as the cost of doing business has dramatically risen, what the market will bear for membership dues has not. Associations have had to get creative. See below for revenue sources.

Current Funding Source

Currently, the Association is being supported by private loans from a generous patron, Yehudit Zicklin Sidikman. These loans have been made with very favorable terms. All together the Association has borrowed \$550,000 since February 2021.

Expenditures

The Association has spent most our funding on staff and associated taxes and benefits as well as website design, website maintenance, membership, exam, and operational software and apps, and communications (primarily for a creative agency who managed social media, going forward at a lower cost for in-house communications and marketing consultants). We have very little in the way of office overhead as we are 100% remote with each staff members and consultant working out of their



own homes. We have not leased any office space with the exception of a virtual office at \$100/month. Travel expenses have so far been low at less than \$1,000, though that should change once we start attending and hosting in-person events.

Revenue Goals

Determining our revenue goals as a brand new organization is challenging. We need to forecast revenue but cannot refer to any historic revenue as we have none. To forecast revenue, we ideally need to know how many potential members, credential candidates, and other customers exist (ESD professionals



and non-violence professionals interested in ESD). Unfortunately, determining this is difficult because no one has every counted or created a database of all ESD professionals. To adjust for our lack of data, we will need to make assumptions. We have been conservative in our assumptions for budgeting purposes; there could be many more potential credential candidates and members than indicated below. Our marketing plan will reach out beyond this.

Membership Assumptions

Potential members include people all over the world who have been active in ESD for decades; individuals who are relatively new to ESD and those who are still in the process of certifying; individuals who have been practicing under the name "empowerment self-defense" and those who do not use that terminology but who teach in alignment with ESD principles and techniques.

Potential members also include people who advocate for ESD, research ESD, and write about ESD and those who work in sister professions and believe in the principles of ESD, such as social workers, mental health professionals, medical professionals, etc. We look to two primary sources.

ESD Global. ESD Global trains a large number of ESD practitioners, and they have shared some data with us. There are other organizations training instructors, such as No Means No Worldwide, however we do not have that data. Between 2017 and 2022, assuming an 81% completion rate, ESD Global will have trained about 530 instructors.



Association Database. The other primary source we look to is our own internal database. We have created this through online and social media research and through outreach efforts. As of May 2022, there are 600 ESD individuals and organizations in the Association database.

Totals. Subtracting out overlap between the Association and ESD Global numbers and others who are not currently practicing ESD gives us a total of 935 potential Association members.

Credential Candidate Assumptions

With respect to potential credential candidates, people who teach ESD are more likely to want a credential than researchers, advocates, writers, and administrative staff, though we can't count these others out entirely. Some of our 935 potential members from the Association database are no longer teaching or never taught ESD. And a handful of practitioners in the Association database may not be fully aligned with ESD. Subtracting these out gives us a pool of about 500 potential candidates.

We can also assume that ESD Global graduating classes will continue to grow by at least 50 per year (about 250 in 2022, 300 in 2023, and so on). We can also assume that No Means No Worldwide will continue to produce significant numbers of instructors, not to mention all the other smaller training programs all over the world. So in 2023, we may have 600 or more potential credential candidates with that number growing each year.

Membership Dues and Credentialing Fees



We offer Individual Memberships, Organization Memberships. For Individual Memberships we offer annual and monthly payment options. Organization Members get 3 representatives who receive the benefits of individual membership plus additional discounts and benefits; other staff members of the organization also receive discounts. We also offer a Financial Need Discount and International Tiered Pricing to account for differences in standards and costs of living around the world. See Appendix E for a table of membership dues.

Credentialing fees include discounts for members, and if you are an Organization Member, there are additional discounts. See Appendix F for a table of credentialing fees.





Revenue Generation



We are currently funded with loans from a generous patron (Yudit Zicklin Sidikman). We do not want to be dependent upon these loans for long, however. We cannot look to donations because we are a 501(c)(6) organization and donations to 501(c)(6) organizations are not tax deductible as charitable contributions. Therefore, we must generate revenue.

- 1. Membership Dues. One of our primary objectives is to increase membership. We are currently re-working our communications and marketing plans and will be focused and purposeful about increasing membership. The re-branding mentioned above is part of that.
- 2. Credentialing Fees. We are creating a credentialing program that will bring in exam fees, renewal fees, and fees for study materials.
- 3. Event Fees. We will host an annual conference (first one in April 2023) and possibly additional events. The annual conference will bring in registration fees, booth fees, and sponsorship revenue. However, it will cost money to host, so those costs will have to be offset before we can count revenue dollars. Additional events could bring in registration and booth fees, as well, but we have not yet planned any additional events.
- 4. Sponsorship and Advertising Sales. We will generate revenue from sponsorships. Events, the podcast, the magazine, the ESD directory, and website pages (especially in the membership portal) can all be sponsored. We can accept unlimited sponsorships without jeopardizing our nonprofit status. With respect to advertising, we are limited due to our nonprofit status—if we do sell a little advertising, we will have to pay taxes on any revenue generated this way.
- 5. Continuing Education Course Fees. We will focus on ethics, DEI, substance abuse, and financial empowerment courses. These will be delivered as webinars and recordings. We will contract with vendors for ethics (i.e., Vikrant Pandey in Nepal), DEI/substance abuse, and maybe others.
- 6. Accreditation Fees. Otherwise known as Qualifying Provider fees, these fees will be charged to ESD providers (organizations or individuals) who wish to become accredited (qualifying

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providers) for continuing education credits. The Association will be impartial in determining who qualifies (i.e., require providers to be credentialed or develop application).

- 7. Career Center Revenue Sharing. The main feature of the career center is the jobs board. The jobs board taps into a network of job postings that go far beyond the Association itself, but top posts focus on the jobs most relevant to ESD professionals. We entered into a revenue-sharing agreement whereby the Association gets 50% of all fees charged to employers for posting job ads.
- 8. Subscription Fees. We can also generate a little revenue from subscriptions to Associationcreated content from special podcasts to the magazine to How-Tos. Subscriptions will mostly be sold to non-members.
- 9. Toolkit Sales. We can generate some revenue through sales of Toolkits. Toolkits include one or more How-Tos, checklists, and supporting materials such as sample forms, contracts, and other business documents.
- Grants. Government grants are likely not an option for a 501(c)(6) professional association, however non-government grants may be an option. The Association is exploring this option in 2022. The success of 2022 applications may indicate how realistic this option is for the Association going forward.
- 11. Future Revenue. There are additional options for generating revenue, but most of them require a large membership base. For instance, insurance revenue sharing through an insurance pool, affinity cards, print versions of the Ethics Code, and an online store that sells swag (e.g., water bottles and towels with the Association logo).





5. Marketing, Communications & Outreach

We have just brought on board a new team to manage our marketing and communications. Toby Israel is heading up communications, and Tasha Ina Church is heading up our marketing and social media. Qwan Smith is providing support on social media, researching, and writing. This team is in the process of drafting our new communications and marketing plans. In addition, the team is creating target audience profiles for a variety of micro-audiences. Here you will find big-picture concepts.

International Membership

We are considering our international audiences (outside the United States) in everything we do. We will be offering the second credentialing exam in two or three languages other than English. We are also looking into translation widget for our website and will have other materials, such as our blog, newsletter, and how-tos translated, as well. Translations are not cheap, so we will do translations a little at a time and use translation Al software when possible. We will choose languages by demand.



Communications Objectives

- 1. Relationship Building
- 2. Recruiting New Members
- 3. Attracting Credential Candidates
- 4. Generating Participation in Events
- 5. Inspiring Self-Defense and Other Professionals to Teach ESD (longer-term goal)

Target Audiences (Worldwide)

- 1. Experienced ESD professionals.
- 2. ESD trainees and new ESD professionals.
- 3. Members
- 4. Potential Members

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- 5. Individuals and organizations in referral and cross-over professions (social workers, violenceprevention & victim advocates, mental health & medical professionals who may refer their clients to ESD; martial artists & studios, healing arts & life coaches, and personal trainers who may want to train to be ESD instructors; see Appendix G for more potential audiences).
- 6. Schools, companies, sports teams, and other entities who might sponsor ESD classes for their employees/members.

Communications Messages

- 1. We want to learn about you & your practice.
- 2. Overview of Association
 - a. Association is here to help, how can we help?
 - b. Bringing ESD professionals closer together while growing the ESD community (networking).
 - c. Earn respect of public, governments, school systems, and politicians.
 - d. All who ascribe to the principals of ESD are welcome. Define ESD with the appropriate language and culture-specific messaging.
- 3. Benefits of Joining (tailored to micro-audience interests when possible)
- 4. Event Invitations
- 5. For Experienced ESD Professionals: Approach with humility and curiosity, understand they've been doing this a long time, solicit their stories and feedback, resource sharing, networking, collaborations, invite participation, and feature them.
- 6. For New ESD Professionals: Association is complementary to mentorship programs, supports continuing education, professional development; our resources created for and by ESD professionals. Emphasize validation, credibility, confidence-building benefits of credentialing.
- 7. For Members: Generate excitement, encourage participation in community feed, forums, etc.
- 8. For Members: Invite participation in Association via advisory councils, etc.

Channels of Communication

Events & Podcast

- 1. Sheila's Monthly Mixer.
- 2. Office Hours with Tom.







- 3. Instagram Live Popups (10-20 minutes each, sometimes interviews with Board directors and others; June 2022).
- 4. Podcast (combination of interviews and table discussions with Board directors, Association members, and members of ESD community; dynamic with stimulating discussions— inspirational and solution-oriented; summer 2022)
- 5. Annual Conference (April 2023)
- 6. Additional In-Person, Hybrid, or Virtual Events (symposia, round tables) nothing planned yet.

Website & Written Content



- 1. Public Website Upgrade (warmer, more welcoming, more vibrant, more engaging, more images and videos; coming June 2022)
- 2. Member Portal Upgrade (more engaging and user friendly; coming July 2022)
- 3. Social Media (Facebook, Instagram, Twitter, and LinkedIn)
- 4. Newsletter (forum for Association to highlight members, provide some ESD news, and discuss Association benefits, features, and other news)
- 5. Blog (authored by Association, Board members, Association members, ESD community members)
- 6. Magazine (Online), Quarterly (contributions from ESD community—articles, stories, profiles, art, photography, creative writing, poetry, music; Association content— articles relating to advocacy & lobbying, ESD news, Association news, member features and profiles)
- 7. How-Tos (business and career subject matter) & Toolkits (compilations of How-Tos with checklists and sample forms & other useful documents)

Direct Outreach & Communication

- 1. Direct One-on-One Outreach to ESD Leaders and Other ESD Professionals by executive director, Board directors, Association team members
- 2. Ambassador Program (members who reach out to their communities about Association; host ESD discussions; goals are recruitment and member relations; membership discounts)
- 3. Surveys (usually via social media)
- 4. Website Suggestion Box



Appendix A: Milestones 🧹

Association Milestones

The Association is brand new, it was created from scratch beginning in November 2020. The executive director, Samantha Waterman, prior to assuming this position, was hired as a consultant to first determine how to create a professional association and then to create it. After taking the first steps to create it, she assumed the position of executive director.

- Startup Activities (bank, virtual office, accountant, lawyer, HR consultant, design firm, insurance, employee handbook, payroll software, other organizational and communications software and apps, hire intern and program development consultant)
- Incorporated February 15, 2021 (EIN, registered agent,
- Executive Director Hired March 2021
- Diverse Board Recruited and Seated March April 2021
- Board By-Laws Drafted and Adopted
- IRS Tax-Exempt Application Submitted April 2021, approved September 2021
- Measurements Commission and Report Overseen
- Funding via Loans Secured; Promissory Notes Executed
- Development Plan for Credentialing Program Created
- Membership Portal Software Researched and Secured
- Branding Developed
- Website Designed and Launched
- Budget Drafted
- Board Committees and Credentialing Advisory Council Created
- Revenue Options Researched, Tax Issues Considered
- Legal Issues Addressed (Credentialing, Insurance, Revenue, Taxes, and International Membership)
- Social Media Accounts Created, Launched
- Self Defense Discussion Group Joined (Ethics Code)
- Town Hall Hosted
- Crisis Communications (Open Letter)
- One-on-One Outreach Meetings Begun
- Ethics Course Program Developer Found



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- Self-Defense Liability Insurance Partner Secured & Insurance Access Provided via Website Form
- Association Taxes Managed and Tax Issues with Payroll Software Troubleshooted
- Member Portal Software Launched, including Accounting, E-Commerce, and Jobs Board
- Credentialing Program Development (see Credentialing Milestones, below)
- Finding ESD Project Developed and Partnership with PAVE Prevention Established
- Planning and Budgeting for Online Magazine Begun
- Career Center (Jobs Board) Launched
- Team Expanded (Staff and Consultants)
- Presentation Made at VPEC
- ESD Leadership Event Launched
- Website Expanded to Include How-Tos, Insurance, and Membership
- First Newsletters Published
- First Blogs Published
- Social Event (Monthly Mixer with Sheila Watson) Launched
- DEI Training Researched (for Association Team and as Continuing Education Course)
- Ethics Code Drafted & Adopted by Board (from Self Defense Discussion Group Ethics Code)
- Marketing Consultant Hired
- Organization Membership Created and Launched
- One-on-One Outreach Ramped Up
- Interactive Business-Career Event Launched (Office Hours with Tom Rose)
- New Communications Manager Hired (Power of XYZ replaced)
- New Communications and Marketing Plans Under Development
- New Member Portal Software Researched

Credentialing Program Development Milestones

- Credentialing Program Development Plan & Flow Chart Created
- Credentialing Advisory Council Created by Board
- Credential Types Proposed; Adopted by Board
- Credentialing Advisory Council Recruited and Convened (Multiple Meetings)
- Recognition of Pioneers Considered
- Outreach to International Community
- ESD Defined; Input from AC
- International Considerations Outlined
- · Accessibility Questions Addressed; Input from AC



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- Exam Framework Proposed; Adopted by Board
- Exam Renewal/Continuing Education Period Proposed; Adopted by Board
- Sample Test Questions Shared with Board
- Exam, Renewal, and Related Fee Options Proposed; Adopted by Board
- Applications Requirements Options Proposed; Adopted by Board
- Credentialing Exam Proctoring Researched
- Psychometrician Contracted & Consulted
- Credentialing Legal and Translation Issues Outlined for Psychometrician
- Core Competencies Drafted and Reviewed by Community via Validation Survey
- Review Validation Survey Results and Finalize Exam Specs
- Credentialing Grading and Grievance Plan Developed
- Council of Experts (Including Grading & Review Panel) Created by Board
- First Drafts of Two Exams Completed
- Exam and Proctoring Software Secured
- Exam Reviewers Invited
- NDAs for Exam Reviewers Completed
- Exam Software Launched; Training for Staff

Credentialing Program Timeline

- Application: In Development
- Glossary of Terms: In Development
- Sample Questions for Handbook: In Development
- Review of Exam: Two Rounds Completed, Ongoing
- Finalize Handbook and Glossary: To Do
- Prepare Credentials and Swag: To Do (Credentials first, Swag later)
- Set Up Exam Software to Take Payment Until Integration into New AMS: To Do
- Invitations to Council of Experts: After Exam Finalized
- Invitations to Credentialing Advisory Council: After Exam Finalized
- Promote the Exam: June
- Finalize the Exam: July
- Administer the Exam: August, after NWMAF
- Grade the Exam: mid- to late-August
- Release Results of the Exam: September
- Send Credentials: September or October



Appendix B: Resources & Benefits for Members



We will provide a variety of resources for members. Some will be monetized and contribute to revenue, some will not. Some will be available only to members, some will be available to members and the public but provide discounts for members, and some will be available to all at no cost.

Current Benefits & Features

- Networking–Online Feed, Groups, and Forums to chat, collaborate, advise, and share.
- Participation & Leadership—Run for Board seats, participate on councils, commissions.
- Featuring & Honoring Members—At conferences, in magazine & blog, on podcast.
- Association Online Events-Monthly Mixer, Office Hours with Tom, Instagram Live Popups
- Code of Ethics & Conduct–Ensuring the integrity of ESD practice.
- Restorative Justice Commission–Addressing grievances and complaints of ethics violations.
- Career & Business How-Tos-Relieving pressure from the business side of ESD practice.
- Career & Business Toolkits—Compilations of How-Tos on related matters with relevant checklists and sample forms & other helpful documents.
- Career Center–Jobs board for employers and employees.
- Self-Defense Liability Insurance—Providing access to insurance with quick & easy online application.
- Research & Special Projects—To bolster its real-world impact, sharing & sponsoring ESD research: Measurements Report and We Are Worth Defending Study (ongoing)
- Member Directory–Fostering connectivity among members.
- Blog
- Newsletter
- Association Events (Online Only)-Monthly Mixer and Office Hours

Future Benefits & Features

- Credentialing Program–Elevating the practice of ESD and engendering public trust.
- Continuing Education Program–Maintaining your credential.
- Accreditation Program–Qualifying providers who can award CE credits.



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- Association Events (In-Person, Hybrid, or Virtual)—Annual Conference, Credentialing Celebration Event, roundtables, symposia, and more.
- Association Events (Online Only)–Instagram (and FB?) Live PopUps
- Master ESD Event Calendar–Global ESD & violence-prevention events with links.
- Master ESD Directory–Making it easy to find ESD professionals everywhere.
- Magazine (Online)—Articles, stories, poetry, art, & music from the ESD community.
- Podcast–Interviews and discussions on hot topics, latest research, and features.
- Resource Lists
 - Grants & Other Funding Opportunities
 - Schedule of ESD Fees
 - Calls for Research
 - Published Research
 - ESD Projects for Specific Audiences
 - Potential ESD Clientele/Market Audiences
- Advocacy & Lobbying–Influencing public policy and increasing government funding.
- Research & Special Projects—To bolster its real-world impact, sharing & sponsoring ESD research.
 - Finding ESD
 - Others TBD
- Resource Library (Under Consideration)
- Store-ESD swag (Under Consideration)
- Foundation—Subsidiary 501(c)(3) organization to foundation to provide financial support for ESD scholarships and research (coming in 2024 or 2025).



Appendix C: About ESD

Empowerment self-defense, otherwise known as ESD, is a comprehensive, evidence-based system of violence prevention. It takes an holistic approach to personal safety and self-defense and focuses on empowerment.

ESD teaches students how to understand and navigate power relationships, minimize abuse and violence, and end assaults. It teaches students to Think, Yell, Run, Fight, Tell. It teaches students awareness, how to recognize threatening situations early, how to use boundary-setting skills to prevent escalation to assault. It also prepares students for situations that cannot be diffused, teaching them how to determine whether it is best to yell, run, or fight. And it teaches students how to fight and that they have every right to choose to do so to protect themselves. ESD instructors train their students how to be in command of their minds, bodies, and spirits.



The practice of ESD is designed to accommodate people of every type of physical ability. ESD is not a martial art or form of Krav Maga, it does not require any knowledge or training in martial arts. Though there are ESD instructors who also train in martial arts/Krav Maga and martial arts/Krav Maga organizations that also teach ESD, ESD is not itself a martial art or form of Krav Maga.

ESD instruction includes elements that, together, make it different than other types of self-defense. It begins with the predicate that in most places, roughly 75% of violent crime, including sexual crime, is committed by someone familiar to the victim. ESD teaches students that violence occurs along a spectrum, from body language to verbal abuse to physical assault, both threatened and manifest. It teaches that you never blame the victim, that perpetrators are responsible and should be held accountable for their actions, and that every person, no matter their identity, has the right to defend themselves without retribution. In teaching these things, ESD professionals hope to empower their students and to change societal norms around violence and the treatment of women and people in vulnerable populations.

Empowerment self-defense isn't just about teaching people how to defend themselves in threatening and violent situations, though. It is also a means of personal growth by ATION



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building confidence and healthy personal and professional relationships. It empowers people to live free of fear and violence, no matter who they are.

Finally, another distinguishing quality of ESD is that it is evidence-based and proven to be quite effective. In fact, evidence shows that it is the most effective method for preventing and stopping interpersonal violence. For instance, results from a study in Kenya demonstrate a 63% drop in sexual assaults among program participants. Fifty-

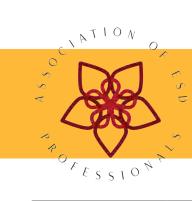
two percent of the adolescent girls in the study used the skills they learned in an attempted sexual assault. And there was a 46% decrease in school dropouts. All this after just 12 hours of ESD instruction.

Imagine if every girl around the world learned these skills in school, imagine the abuse she could avoid, the assaults she could stop, and the harassment she could make ineffective throughout her life. What if every person from a vulnerable population had these tools and could live bold lives as the people they truly are? What if every boy learned these skills and the gained the confidence he needs to never become a bully or worse? Imagine if every youth, teen, and adult of any gender was empowered to protect themselves and walk through life with confidence and kindness.



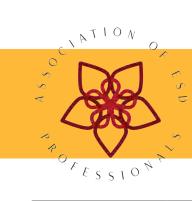
KPIs	Specific	Measurable	Achievable	Relevant	Time-Bound
Ethics & Restorative Justice	The specific goal is to create a system and commission to address grievances and claims of ethical violations using a restorative justice framework.	The goal is measurable. The Board Ethics Committee will create a system which will be adopted by the Board. The Board will create a restorative justice commission.	This goal is achievable. The Ethics Committee has shown that it can achieve its goals when it created the ethics code, and the Board has shown that it supports the Committee's work by adopting the code. The Board has also created advisory councils, so creating a commission is a reasonable goal.	This goal is relevant to the Association's mission to elevate and fortify the ESD profession. This goal is also relevant to the advocacy and lobbying program because achieving it will engender public trust and the trust of government officials and politicians.	This goal is time- bound. The Board Ethics Committee has begun work, it can share its work and get feedback from the board via email, and there will be several board meetings before this fall, so that this goal can be achieved by fall.

Appendix D: KPI SMART Analysis



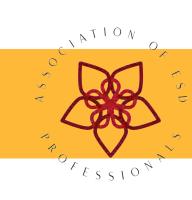
KPIs	Specific	Measurable	Achievable	Relevant	Time-Bound
Credentialing & Continuing Education	This goal is very specific. The goal is to create a credentialing program entailing the creation of a credentialing exam.	This goal is measurable. The credentialing exam will be launched with administration of the first exam. A successful launch will be preceded by an application and an exam handbook. Success is measurable, as well. If 10 or more candidates register for the first exam, we will consider the launch a success.	This goal is achievable. As of May 10, 2022, we are already well on our way to being ready to promote the first exam in late June with the first exam to be administered in early August. The first two exams have already been written and reviewed by an outside panel of ESD experts. The application has been researched and only has to be written. The first draft of the handbook has already been reviewed.	This goal is relevant to the mission and vision of the Association. The Association aims to standardize the instruction and practice of ESD, and a credentialing exam will do just that by engendering trust in ESD professionals and the profession with a measurable way to determine who is practicing ESD as opposed to other forms of self-defense, who has agreed to adhere to an ethics code, and who has proven themselves to be competent in the instruction of ESD. The continuing education and accreditation program further these goals, as well.	This goal is time- bound. When the first exam is administered, the program has begun to operate. We expect that to happen this summer 2022. Efforts to promote many of these objectives will serve as incentive to stay close to our schedule.





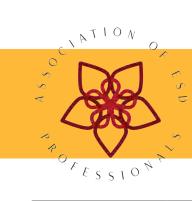
KPIs	Specific	Measurable	Achievable	Relevant	Time-Bound
Advocacy & Lobbying	This goal is specific. We intend to create a program that will include grassroots advocacy (projects run by the association and projects with which the Association partners) and lobbying. The lobbying portion will be carried out by the Association executive director and/or hired lobbyists. The objectives of the program will be determined later this year (2022), but will include things like lobbying for self-defense to be included in VAWA in order to make funding available to ESD professionals through that legislation.	This goal is measurable. The program will include specific objectives that will be adopted by the Board of Directors.	The goal is achievable, but its scope and success will be dependent on sufficient funding. Creating the advocacy and lobbying program will require a plan (very doable) and funding (depends on future loans from our patron (especially in early years) and on revenue.	This goal is relevant to the mission and vision of the Association. An advocacy and lobbying program will further the goals of expanding the reach of ESD, growing public awareness, enhancing its reputation with governments and the public, influencing public policy, and increasing funding for ESD.	This goal is time- bound. We will develop this program beginning fall 2022, hoping to launch it at the beginning of 2023 if funds are available, later if funds are not yet available. Efforts to promote many of these objectives will serve as incentive to stay close to our schedule.

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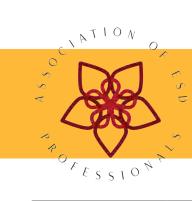
KPIs	Specific	Measurable	Achievable	Relevant	Time-Bound
Fostering Community	This goal is specific as defined in this document (to foster networking and cooperation, the Association is and will be hosting and providing networking opportunities through an online community, Association events, an ESD directory, a master calendar of ESD and violence-prevention events, and a newsletter, online magazine with user- generated content, and podcast. We also believe that our rebranding, expected in the next month, will further this goal.	This goal is measurable. We will be able to count the number of ESD professionals taking part in every aspect of this plan, from the number of listeners to our podcast, to the number of subscriptions to our magazine, to the number of attendees at our events. Social media and website analytics will also provide concrete numbers.	This goal and its objectives are all achievable. The only question is whether they can all be achieved within the time period provided. It is possible, but there are several factors that could slow us down, including problems with implementing and using new membership, social media, and communications management software, rebranding our website in a timely fashion, and having the womanpower to create the magazine by fall. We believe these objectives are achievable in the time frames provided, but there could be unforeseen delays.	This goal is relevant to the mission and vision of the Association. One of the main purposes of the Association is to foster networking and cooperation among ESD professionals, especially those who do not yet know one another. The specific objectives are relevant to this goal because they will engage ESD professionals in conversation and will provide opportunities for them to meet one another and learn about each other's work, creating opportunities for collaborations.	This goal is time- bound as we have created soft deadlines for each objective. Efforts to promote many of these objectives will serve as incentive to stay close to our schedule.

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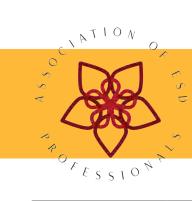
	Relevant	Time-Bound
Support Membersdescribed in this document. Specific resources are listed as part of the plan for bringing benefits to Association members. Specifically, we will provide the following: 1) available grants & other funding sources, 2) research opportunities, 3) ongoing research projects, 4) new research reports, 5) ESD directory, 6) ESD and non-violence conferences and summits, 7) schedule of fees, 8) ESD news, 9) access to self-defensemeasurable. We will provide the lists to measurable. We will provide the lists to members and the greater ESD community, depending upon the particular resource, on our website. We have already provided some of these resources.Now that we have put together a new communications team, we are better equipped updated these resources.Mesou Associ together a new together a new communications team, updated these resources.Mesou together a new together a new togethe	D professionals in their ik and advancement. ese resources will aid mbers and others in ESD community with career & business side heir ESD practices, uding career relopment through tinuing education g., not just the coming program, but also igs like the asurements Report and gs that address stantive ESD issues).	This goal includes some time-bound objectives, while others are not. We have set deadlines for some of these resources, deadlines of this summer and fall, but others have not yet been scheduled. Those that have not yet been scheduled will be scheduled in the coming months with the new communications team.

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KPIs	Specific	Measurable	Achievable	Relevant	Time-Bound
Making the Association Accessible	This goal is specific. We have a goal of making the Association accessible to all, no matter their financial position, and we have started by implementing discounts and international tiered pricing. We plan on creating a subsidiary 501(c)(3) foundation in 2023 or 2024, depending on how we are progressing toward our financial goal of becoming a self-sustaining association.	This goal is measurable, though a little more difficult to measure than other goals. We won't always know when people are choosing not to join the Association because of the cost. We can conduct some market research to determine this, but that will not be in the budget for a while and it would only be so accurate since we do not yet know where to find many ESD professionals. The discounts and international tiered pricing is currently available and so far each has been used once.	Some of these objectives are achievable as they have already been instituted. Achieving the overall goal, however, does require achieving the final objective of creating a foundation that can provide additional and greater discounts to more people. This is most likely achievable, we know that a 501(c)(6) professional association can create a subsidiary 501(c)(3) foundation. We still need to confirm that we can use the funds we raise to offset the cost of membership and credentialing.	This goal is relevant to the mission and vision of the Association. To make the Association accessible to all and to aid financial empowerment, we offer discounts and international tiered pricing. We will also create a subsidiary 501(c)(3) foundation to provide financial support to ESD professionals and make membership and credentialing possible for those who cannot otherwise afford them.	Some of these objectives are time-bound, namely the discounts and International tiered pricing we are already providing. Creation of the 501(c)(3) foundation will probably require seed money and will certainly require time and effort. The Association does not have either at the moment, but expects that attention can be turned to this in 2023 or 2024.

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KPIs	Specific	Measurable	Achievable	Relevant	Time-Bound
Self-Sufficiency	This goal is specific. The Association intends to become a self-sufficient organization no longer dependent on loans. To do that, we must generate revenue (and apply for grants). We intend to generate revenue in the specific ways outlined in this Plan, however changes will be made as necessary to each revenue generating objective (after reviewing analytics to determine success). Less specific are the marketing techniques we will use for each revenue generating objective. However, we have included a section that provides a preview to our new marketing plan.	This goal is measurable. We must generate revenue, and we will know how much we are generating. We will have analytics to measure the effectiveness of our marketing, as well.	This goal is achievable. The question is how long it will take us to achieve it. We would like to be self-sufficient as soon as possible, no later than 2025. The marketing and communications plans we are completing this month and that we will implement no later than this July 2022 will tell us a lot about how much revenue we can bring in this year and next. Once these plans are in place, we will hire a consultant to do revenue forecasting.	In an effort to become self-sufficient, we will focus on generating revenue in several ways, such as: 1) Increasing membership and membership dues, 2) creating successful credentialing program with its exam fees and fees for study materials, 3) annual event in April 2023 and possibly additional smaller events, 4) sponsorships (events, podcast, magazine, and website/membership portal), and 5) subscriptions to Association-created resources.	This goal is time- bound in that we hope to be self- sufficient by 2024. As we work toward that goal, we intend to generate greater amounts of revenue every year so that we need to borrow less.

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Appendix E: Membership Dues

	Annual Dues	Monthly Dues
Individual Member	\$200	\$25
Organization Member*	\$600	N/A
Discounted**	\$75	N/A
International Tiered Pricing°		
Tier 1	\$200	N/A
Tier 2	\$150	N/A
Tier 3	\$100	N/A
Tier 4	\$50	N/A

* Organization Member dues are locked in for the next four years.

- ** Discounts are for people with household income below \$40,000 (a little bit more than 300% of U.S. Federal Poverty Guideline, 2021).
- Tier 1 full price dues for wealthiest countries; Tier 2 \$150 dues for people in countries with per capita GDP-PPP below \$40,000; Tier 3 – \$100 dues for people in countries with per capita GDP below \$20,000; and tier 4 – \$50 dues for people in countries with per capita GDP below \$10,000. Our sources for determining GDP-PPP (gross domestic product + purchasing price power) include the World Bank, International Monetary Fund, and U.S. Central Intelligence Agency.



Appendix F: Credentialing Program Fees

Type of Fee	Members	Org Reps∘	Org Team Members**	Non-Members
Exam Fees (Paid Once)	\$400	\$300 (25% Off)	\$340 (15% Off)	\$500
Discounted Exam Fees* (Paid Once)	\$150	\$150	\$150	\$250
Exam Retake Fees (Per Module**)	\$80	\$80	\$80	\$100
Exam Retake Fees (For Entire Exam)	\$350	\$350	\$350	\$395
Renewal Fees (Every 3 Years, Submit CE Statement)	\$100	\$100	\$100	\$350
Discounted Renewal Fees* (Every 3 Years, Submit CE Statement)	\$50	\$50	\$50	\$150

* Discounts are for people with household income below \$40,000 (a little bit more than 300% of U.S. Federal Poverty Guideline, 2021).

• Organization Membership includes a 25% discount on credentialing fees for the organization's membership representatives (each organization gets 3).

Organization Membership includes a 25% discount on credentialing fees for the organization's membership representatives (each organization gets 3).

NOTE: Fees for study guides not yet determined.

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Appendix G: Potential Audiences

- ESD Instructors
- ESD Instructor-Trainers
- ESD Advocates
- ESD Researchers
- ESD Organization Principles & Staff
- ESD Writers
- ESD Veterans/Pioneers
- Self-Defense Instructors
- Martial Artists & Studio Owners
- Social Workers
- Mental Health Professionals (psychologists, therapists, counselors)
- Domestic Violence Advocates & Organization Executives
- Victim Assistance Advocates & Staff
- Government Officials and Politicians
- Life Coaches
- Massage Therapists & Healing Arts Professionals
- Physical Therapists
- Yoga Instructors
- Personal Trainers & Gym Owners/Managers
- Police, Firefighters & Paramedics
- Medical Providers (doctors & nurses, especially Emergency and Orthopedics)
- Educators (teachers, principles, superintendents, especially Physical Education, Health)
- Education Administrators, Federal and State Government
- Airline Attendants & Pilots
- Hospitality Workers
- Restaurant & Bar Workers
- Defense Attorneys
- Court Clerks & Judges
- Building Security Guards
- Corporations (especially with large staffs)
- Non-Profit Organizations
- And many more!



