

*"The irony of the modern market is that it can get a spare part from across the world, but a neighbor still might not know that the mechanic with the skills to fix the car is right next door."* – Donnie Maclurcan, Offers and Needs Market Creator

## What's the Offers and Needs Market?

The Offers and Needs Market (OANM) is a lively, guided exchange where groups swap skills, stuff, and support – anything from tech help to a new mindset to the food on your plate. Whether it's free, bartered, or paid, it's all about better knowing that what you offer matters and what you need is valued.



### General Context

The OANM, like [asset-mapping](#), is a way to practice Asset-Based Community Development as you focus on what resources (a.k.a. “assets”) a group already has. It's a simple, playful, and cheerful way to highlight what people can already do, and provides a positive way to short-circuit the “But we don’t have any resources!” narrative. The emphasis is on creating and sustaining a mindset of what you can do to help – and get helped – right now.

## A Few Examples:

- A local business has an incoming supply of extra pallets and some neighbors need wood to create furniture for a homeless shelter. Match!
- A person has friends in creative agencies and a freelancer is looking for their latest work connection. Match!
- A spreadsheet enthusiast loves teaching people simple ways to use Microsoft Excel and another person needs to learn how to use Excel for work. Match!

[Click here to see anonymized examples in a spreadsheet](#) from OANMs that I (Joel Zaslofsky) have run at various events and gatherings.

## Table of Contents

What's the Offers and Needs Market? .....	1
Table of Contents.....	2
The High-Level Process.....	3
Notes about My Style .....	4
Assumptions about Your OANM Choices.....	4
Formatting Cues in This Document.....	4
How an OANM Creates and Helps Communities .....	5
The Checklists .....	6
The Run Sheet.....	8
Facilitator Preparation and Prerequisites.....	9
Marketing Your OANM .....	21
Day of Market Facilitator Preparation .....	26
The OANM Real-Time Process .....	30
Spotlighting, Survey, and/or Group Reflection.....	37
End the Event .....	40
Administrative Steps After Ending the Event .....	40
The Follow-Up.....	41
Miscellaneous Tips .....	42
What Now? .....	42
Changelog .....	43
Acknowledgments.....	43

## The High-Level Process



(Click the image to view larger)

## Notes about My Style

My style of running OANMs is rather comprehensive. So you might be better served using another facilitator toolkit like [this great one from offersandneeds.com](https://offersandneeds.com).

I recommend you're at least some of these things below or you might end up more frustrated than satisfied. Ideally, you:

- Enjoy attention to detail.
- Are willing to do some work up front to make the real-time market experience better for everyone.
- Have a good pool of potential participants (say *that* five times fast!). Requiring that they invest 15-45 minutes before the market opens means fewer people will participate than if you didn't have any prerequisites. Expect that one out of ten or fewer people you invite will do the required prep work.
- Aren't running this as part of an unconference. The unconference "Law of two feet/mobility" – meaning people who aren't learning or contributing can use their virtual two feet to leave – doesn't mesh well with this style of OANM.

## Assumptions about Your OANM Choices

There are several assumptions baked into this style of OANM. You're free to make different design decisions, but it means big adjustments to what's proposed in this guide.

Here are my operating assumptions:

- You're running it by yourself with no co-facilitators and no event co-organizers.
- You have access to a video conferencing platform, permission to create breakout rooms, and understand how to use the breakout rooms.
- There's no financial registration fee.
- It won't be recorded and will be two hours or less.
- You have a \$0.00 budget to run the event.
- You already know how to use common online tools like Google Drive, spreadsheets, and/or Zoom.

## Formatting Cues in This Document

You'll see some formatting in this document that prompts you to either read something verbatim or take an action. Here's a brief guide to what each formatting implies:

[Anything that's in brackets like this and colored red is a placeholder for you to customize with your specific context or a prompt to do an action]

"Anything that's indented like this and contains quotes (") is intended for you to read verbatim or customize to your tone, length, and style."

## How an OANM Creates and Helps Communities

- **Stronger Bonds:** You get to see who knows what, who needs what, and who's got your back.
- **New Possibilities:** People team up to make things happen in ways they couldn't alone.
- **It's Fun (Seriously):** Want an accountability buddy, creative sidekick, or ukulele jam partner? Those are real examples among endless options.
- **Quick, Real Feedback:** Share an idea or project, get thoughtful responses right away, and learn how it might be life-changing.
- **Less Waste:** One person's extra is another's perfect fit – saving time, energy, and resources.
- **More Ownership:** The more you give and receive, the more committed you feel. Now you, and the group, are about what's abundant instead of what's scarce.
- **Confidence Boost:** Asking for what you need and owning your gifts? That's real power.
- **Super-Efficient:** It taps into what already exists ... people's often-hidden talents and treasures.
- **Multiple Exchange Modes:** Gift, barter, or commercial market? Yes to all three in one place!
- **Feel-Good Science:** Giving makes people happier and healthier with tons of research to back it up.
- **Safe for All Personalities:** Are you shy, introverted, neurodivergent, or just show up in a unique way? Connections and exchanges come easier here.

## The Checklists

You may want to add reminders to your calendar for each of the checklists or some items in a specific checklist. Even seasoned facilitators can forget some of the key steps!

### Facilitator Preparation and Prerequisites

<input type="checkbox"/> (14+ days ahead, optional) <a href="#">Look through the offersandneeds.com decisions checklist</a> for additional items to consider (e.g., surveying participants about their accessibility needs).
<input type="checkbox"/> (14+ days ahead, optional) <a href="#">Recruit some helpers</a> .
<input type="checkbox"/> (14+ days ahead) <a href="#">Create your unique templates</a> to send to participants.
<input type="checkbox"/> (14+ days ahead) <a href="#">Create the event invite</a> and promote it in various places.
<input type="checkbox"/> (14+ days ahead) Ask participants to send you their offers and needs. Give them a deadline so you have time to aggregate, edit, and format the submissions.
<input type="checkbox"/> (14+ days ahead) Decide if you want to run a <a href="#">preparation session for participants</a> and then set it up if you do.
<input type="checkbox"/> (5-10 days ahead) <a href="#">Remind RSVPers who haven't done the prep work</a> of their deadline.
<input type="checkbox"/> (3+ days ahead) Remove links/access to submit offers and needs.
<input type="checkbox"/> (3+ days ahead, optional) Create your <a href="#">run sheet</a> .
<input type="checkbox"/> (2-3 days ahead) <a href="#">Aggregate, edit, and format the submissions</a> .
<input type="checkbox"/> (2-3 days ahead) Give co-facilitators or backups admin access to key files so the show can go on without you (if necessary).
<input type="checkbox"/> (48 hours ahead) <a href="#">Email all participants</a> who submitted their offers and needs with the key information for the live market (e.g., Zoom link and master spreadsheet link).
<input type="checkbox"/> (1-24 hours ahead) <a href="#">Email all participants again</a> with the key information.

### Marketing

<input type="checkbox"/> (14+ days ahead) <a href="#">Create the event invite</a> .
<input type="checkbox"/> (14+ days ahead) Create reminders to promote in specific places at specific times. Space out the promotion so you're not doing <i>all</i> of it in a short period of time (e.g., a group email on one day, social media barrage the next day, and personal invites the following day).
<input type="checkbox"/> (4-14+ days ahead) Promote however you see fit. One of your needs may be asking others to help you market the market. ;)
<input type="checkbox"/> (4+ days ahead) Make a "go/no go" decision about running the event based on the number of people who have completed their offers and needs or total submissions. If you're canceling, communicate with <i>all</i> people who registered, RSVPed, or submitted offers and needs.

## Day of Market Facilitator Preparation

<input type="checkbox"/>	(15+ minutes before) <a href="#">Open key digital files</a> .
<input type="checkbox"/>	(15+ minutes before) <a href="#">Get any pre-populated polls ready to go</a> .
<input type="checkbox"/>	(15+ minutes before, optional) <a href="#">Turn on the video conferencing waiting room</a> .
<input type="checkbox"/>	(15+ minutes before) <a href="#">Load images for screen sharing</a> .
<input type="checkbox"/>	(15+ minutes before) <a href="#">Configure your breakout rooms</a> .
<input type="checkbox"/>	(15+ minutes before) <a href="#">Set up your physical environment</a> .

## The OANM Real-Time Process

<input type="checkbox"/>	(3-5 minutes) <a href="#">Welcome and provide context</a> .
<input type="checkbox"/>	(3-5 minutes) Run through <a href="#">the housekeeping items</a> .
<input type="checkbox"/>	(As long as you need) <a href="#">Run the live exchange of Offers and Needs</a> .
<input type="checkbox"/>	(3-5 minutes) <a href="#">Spotlight specific Offers and/or Needs</a> .
<input type="checkbox"/>	(7-8 minutes) Have participants <a href="#">complete the real-time survey</a> .
<input type="checkbox"/>	(As long as you want) <a href="#">Give participants time to reflect</a> on the experience.
<input type="checkbox"/>	(1-2 minutes) <a href="#">End the event</a> .

## Administrative Steps After Ending the Event

<input type="checkbox"/>	(If necessary) Undo the video conferencing waiting room option.
--------------------------	---

## The Follow-Up

<input type="checkbox"/>	(1-5 days after) <a href="#">Edit the master spreadsheet</a> .
<input type="checkbox"/>	(1-5 days after) <a href="#">Send the recap email</a> .
<input type="checkbox"/>	(1-5 days after) Review the <a href="#">real-time survey results</a> .
<input type="checkbox"/>	(7+ days after) Plan your next OANM. :)

## The Run Sheet

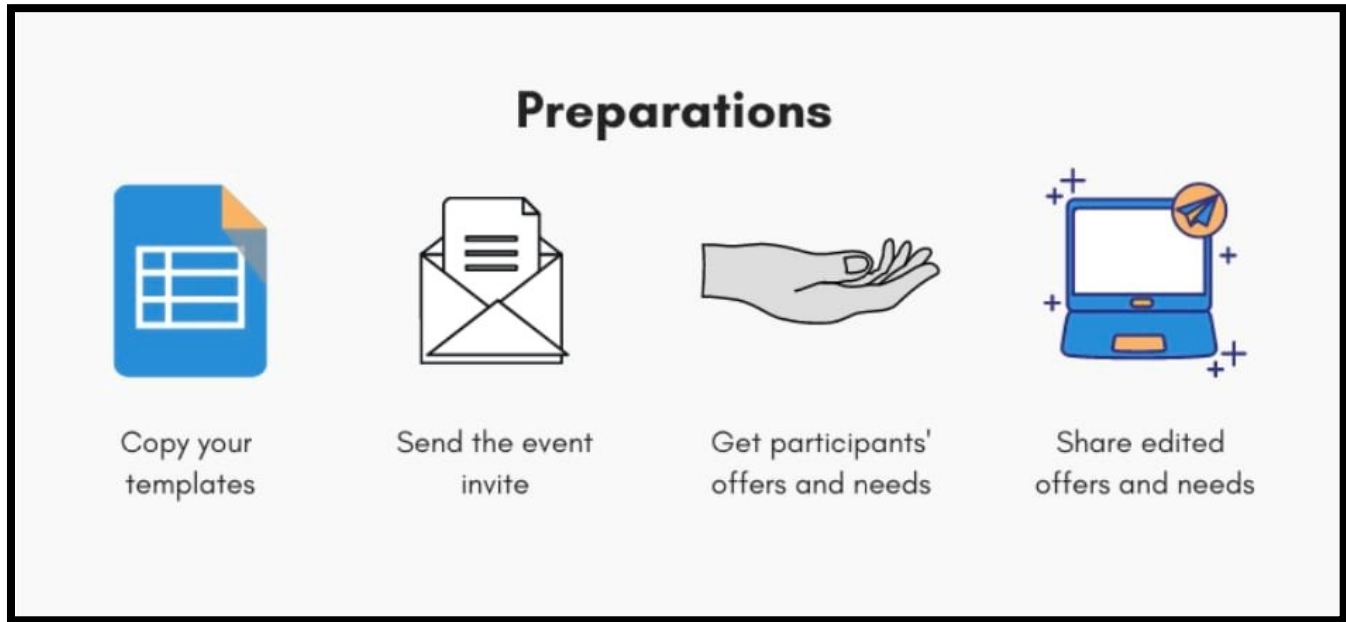
A run sheet is a list of procedures or events organized in a specific timed sequence. They help break an overall process into chunks where you can pace yourself, see who's involved at any point (and for how long), when breaks will take place, contain notes or prompts that you might otherwise miss, and more.

My ideal online OANM event is two hours, although I've done it in as little as 90 minutes when necessary. You won't know how long you want your OANM to take you – or how long it might *actually* take you – unless you have your own run sheet or another document that sets your pace for each part of the facilitation.

[Here's an example of how the offersandneeds.com style of online OANM approaches a run sheet.](#)



## Facilitator Preparation and Prerequisites



### Digital Supplies and Knowledge

1. An Internet-connected device with a 7-inch (18 cm) screen or larger. Your best and most efficient experience is on a laptop or desktop computer.
2. Video conferencing platform (e.g., Zoom) installed and a general understanding of how it works.
3. A basic understanding of spreadsheets. It's our default tool because almost everyone knows the basics of spreadsheets, they're free, and can be accessed anywhere.

### The Ideal Environment

- A quiet space that's light on physical distractions.
- Disabled notifications on your mobile devices so you can stay fully present.

### Templates and Digital Tools

#### ***Make a Unique Version of Google Forms Offers Capture Survey Template***

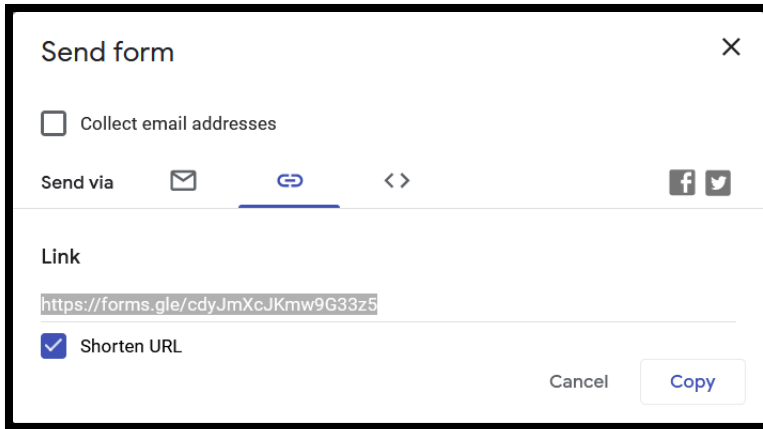
The order of questions is designed to make it easy for you to dump data from a spreadsheet export into the master, aggregated spreadsheet you share with participants.

1. [Click this Template: Online OANM Offers Capture Survey.](#)
2. Click the "Make a copy" button on the Google form prompt below where it says "Copy document ... Would you like to make a copy of OANM Offers Survey?"
3. Rename the file.

Example: [YYYY-MM-DD] [Event Name] Online OANM Offers Capture Survey






4. (If necessary) Move the template copy from your root Google Drive folder into a OANM specific folder.
5. Open the form.

6. Click the "Send" button, then the "Send via ... [hyperlink]" option, and then click the "Shorten URL" checkbox.



Send form

☐ Collect email addresses

Send via     

Link

<https://forms.gle/cdyJmXcJKmw9G33z5>

☒ Shorten URL

Cancel Copy

7. Copy and paste the unique link into the [OANM Event Description Template](#) of this procedure document in the section where you provide participants a link to this form.

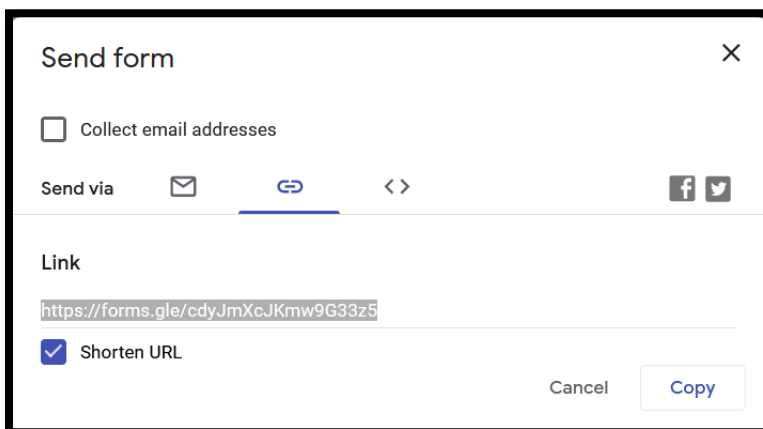
#### ***Make a Unique Version of Google Forms Needs Capture Survey Template***

The order of questions is designed to make it easy for you to dump data from a spreadsheet export into the master, aggregated spreadsheet you share with participants.

1. [Click this Template: Online OANM Needs Capture Survey.](#)
2. Click the "Make a copy" button on the Google form prompt below where it says "Copy document ... Would you like to make a copy of OANM Offers Survey?"
3. Rename the file.






Example: [YYYY-MM-DD] [Event Name] Online OANM Needs Capture Survey

4. (If necessary) Move the template copy from your root Google Drive folder into a OANM specific folder.
5. Open the form.
6. Click the "Send" button, then the "Send via ... [hyperlink]" option, and then click the "Shorten URL" checkbox.



Send form

☐ Collect email addresses

Send via     

Link

<https://forms.gle/cdyJmXcJKmw9G33z5>

☒ Shorten URL

Cancel Copy

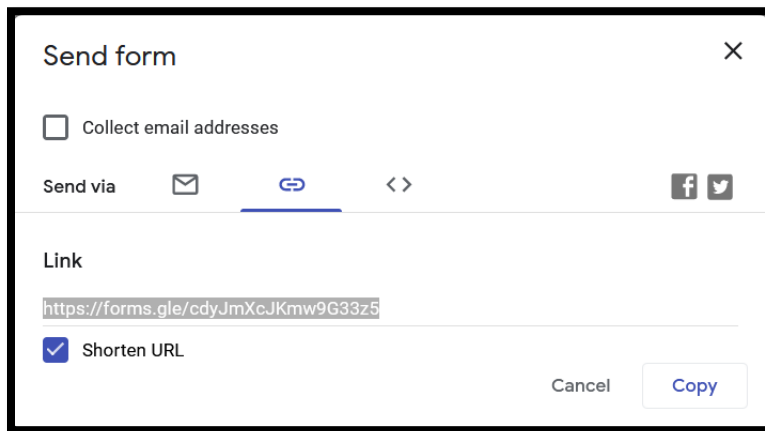
7. Copy and paste the unique link into the [OANM Event Description Template](#) of this procedure document in the section where you provide participants a link to this form.

### ***Make a Unique Version of the Participant Offers and Needs Capture Template***

1. [Click this Template: Offers and Needs Market Individual Entries.](#)
2. Click the "Make a copy" button on the Google form prompt below where it says "Copy document ... Would you like to make a copy of OANM Offers Survey?"
3. Rename the file.

Example: [YYYY-MM-DD] [Event Name] OANM Offers and Needs Capture Spreadsheet

4. (If necessary) Move the template copy from your root Google Drive folder into a OANM specific folder.
5. Open the form.
6. Click the "Send" button, then the "Send via ... [hyperlink]" option, and then click the "Shorten URL" checkbox.



The screenshot shows the 'Send form' dialog box in Google Forms. At the top, there's a close button (X). Below it is a checkbox for 'Collect email addresses'. The 'Send via' section has three options: an email icon, a link icon (which is selected and underlined), and a code icon. To the right of these are social media icons for Facebook and Twitter. Below the 'Send via' section is the 'Link' section, which contains a text box with the URL 'https://forms.gle/cdyJmXcJKmw9G33z5'. Below the text box is a checked checkbox for 'Shorten URL'. At the bottom right, there are 'Cancel' and 'Copy' buttons.

7. Copy and paste the unique link into the [OANM Event Description Template](#) of this procedure document in the section where you provide participants a link to this spreadsheet template.

### ***Make a Unique Version of the Facilitator Master Offers and Needs Capture Spreadsheet Template***

1. Click this [Template: Offers and Needs Market Data Capturing Spreadsheet \(Online\)](#) and download a copy.
2. Rename the file.

Example: [YYYY-MM-DD] [Event Name] Online OANM Offers and Needs Capture Spreadsheet.xlsx

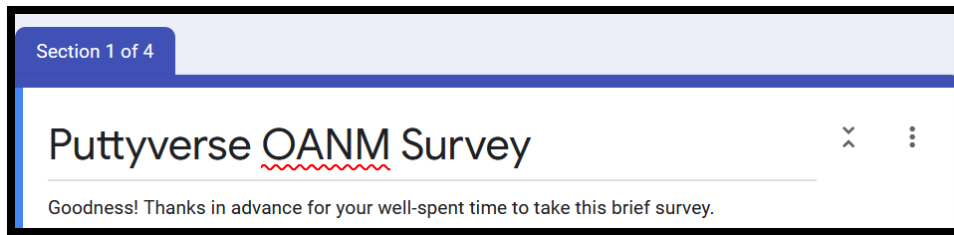
3. Delete the placeholder rows 2-8 to show you what a populated template will start to look like.
4. (If necessary) Upload the template copy to Google Drive if you'd rather use a Google Sheets version instead of Excel.
5. Put the spreadsheet template somewhere handy.

### ***Make a Unique Version of Google Forms (Near the) End of Event Survey Template***

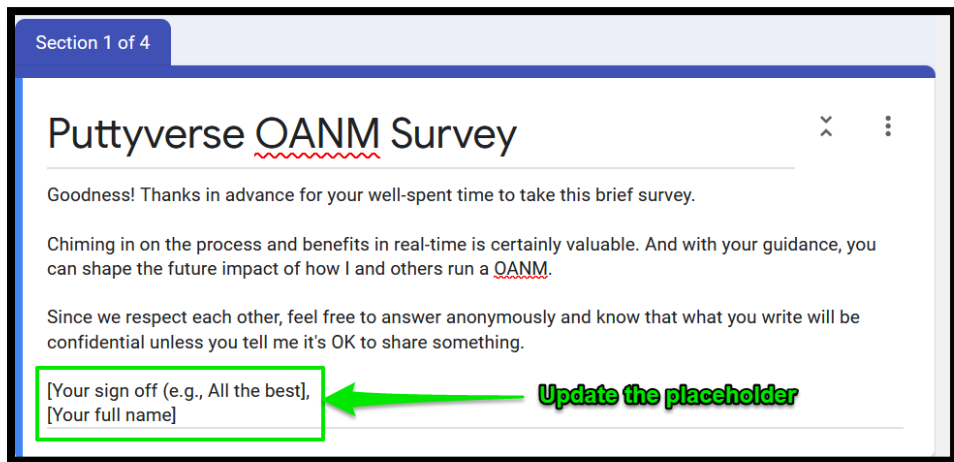
1. [Click this Template: Online Offers and Needs Market \(Near the\) End of Event Survey link.](#)
2. Click the "Make a copy" button on the Google form prompt below where it says "Copy document ... Would you like to make a copy of OANM Offers Survey?"
3. Rename the file.

Example: [YYYY-MM-DD] [Event Name] OANM End of Event Survey

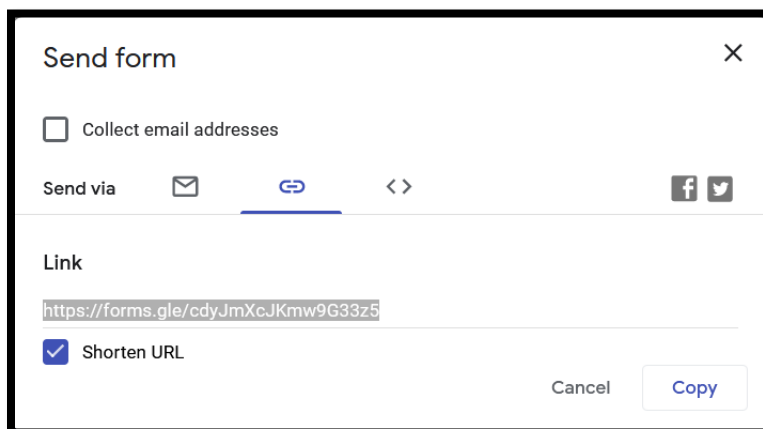
4. Rename the "Online Offers and Needs Market (OANM) Survey" survey heading to something more appropriate.



- Update the "[Your sign off (e.g., All the best), [Your full name]]" placeholder at the end of the survey lead-in text.



- (If necessary) Move the template copy from your root Google Drive folder into a OANM specific folder.
- Open the form.
- Click the "Send" button, then the "Send via ... [hyperlink]" option, and then click the "Shorten URL" checkbox.



- Copy and paste the unique link into the [Spotlighting, Survey, and/or Networking](#) section of this procedure document in the section where you provide participants a link to this form.

## Recruiting Helpers

If you need help, ask for it! What better time than now to start making your needs known? ;)

After all, it's more sustainable and fun to recruit others for key roles. Just make sure to define and schedule their tasks in advance so they don't have to guess what you need them to do, when, and who else is involved.

*Pro tip:* Explain why you think a helper would be great at a certain role. Be specific! Communicate the unique style, mindset, or skills that make you believe it will be rewarding for them and meaningful for everyone else. Also feel free to make tangible what they'll get from helping – a free ticket, a meal before/after, hugs, etc.

Consider the list of helpers below a good starting point:

**Co-facilitator.** The main face at a OANM doesn't have to be you. But even if you're comfortable doing things like facilitating group conversations and keeping the process on track, it can be great to have a co-facilitator to share responsibilities with and take over part or all of a gathering if you're unavailable.

**Promoter.** Ideally, this person knows how to connect online and offline, understands effective promotional tactics that are aligned with the OANM spirit, and how to craft a compelling story. They also know how to implement the latest tech or old-school strategies. They can send emails, market on social media, engage people around town, and just generally be your OANM ambassador.

**Moderator/Welcomer.** Who do you know that radiates warmth and is quick with a smile? Who has a knack for fun chats, will help people feel comfortable right away, and will set a positive tone from the beginning? Put them front-and-center when you need it.

**Moment Capturer** (i.e., Photographer, Videographer, or Graphic Recorder). Everyone loves seeing and sharing pictures, videos, or creative illustrations of a meaningful get together. Find one person – or better yet, multiple people skilled in different mediums – to capture the best moments.

*Note:* Get negative consent – an acknowledgment that inaction equals agreement – from participants to capture and share their presence outside the gathering (e.g., “Raise your hand or tell me after the gathering if you're not comfortable having pictures, videos, or other evidence of your presence here shared privately among us or publicly”).

## Identifying Accessibility Needs

This is something that the Post Growth Institute does particularly well with their OANMs. If you're going to solicit input or information from your potential participants, consider making [a copy of this Google Form template to assess their accessibility needs](#).

## Running a Preparation Session

One of the main reasons people don't participate in an OANM is that they just can't think of what their offers and/or needs are. Enter the guided preparation session!

This is totally optional, but not a lot of work with a high upside for doing it.

### *The Preparation Session Process*

This comes from [Sónia da Veiga](#) (thanks, Sónia!) and it still a work in progress.

## Scheduling / Timing

Once the OANM is scheduled, run a preparation session 3-7 days before the submission deadline.

Ideally, you'd do it exactly one week before the live OANM. For example, if you're running the OANM on October 10 at 2:00 pm local time, run the preparation session on October 3 at 2:00 pm local time. Chances are if people carved out space in their life for the OANM, they can carve out space on the same day of the week and time for a preparation session.

## Duration

45-60 minutes is good for up to 10 people. Feel free to make it longer if you anticipate having more than 10.

## Facilitator Prep

Have the following resources ready to go:

- The OANM event page. This will prompt people to RSVP, read the event description, and have the submission links handy.
- The Participants Guide. Let everyone know this is a *must read*.
- Templates and forms from the [Templates and Digital Tools section](#) of the guide.
- The primary facilitator's contact information (if that's not you) so people know where to send their offers and needs.

## Topics

Speak about whatever topics you feel are most important for participants to be most efficient. Sónia suggests:

- Explaining the OANM objectives and the spirit behind it.
- A walkthrough of the event process.
- Tech tips for the platform you'll be using (e.g., how breakout rooms will work).
- Sharing success stories from previous OANMs.
- Helping participants get clear on their offers and needs with examples from previous events, making suggestions based on personal knowledge of their assets, or by "coaching" them into deeper understanding of what they have to offer.
- Tips on how to enjoy the event as an introvert, highly sensitive person, with tech limitations (e.g., only being able to use audio), etc.
  - It's possible to interact only via chat and/or to stay in the main room for the entire OANM duration.
  - You don't have to agree to an exchange if it feels uncomfortable, if the offer or need has lost its relevance to you, etc.
- Giving them quiet time and space to actually submit their offers and needs so they don't wait for a "later" that never comes.

## Facilitating

Possible approaches include:

- Making a brief presentation of all your facilitator checklist items and then asking what questions people have.
- Asking participants to introduce themselves and state what they'd like to be addressed in the session.
- Whatever else you got. :)

## ***The Preparation Session Event Description Template***

Use this template or make up your own.

**Title:** The Offers and Needs Market Preparation Session

### **Description:**

Are you curious and/or excited about the Offers and Needs Market (OANM) on [\[insert whatever date it's on \(e.g., "September 10"\)\]](#) [\[hyperlink to the main event detail page on the placeholder text as well\]](#)?

The Offers and Needs Market (OANM) is a lively, guided exchange where groups swap skills, stuff, and support – anything from tech help to a new mindset to the food on your plate. Whether it's free, bartered, or paid, it's all about better knowing that what you offer matters and what you need is valued.

In order to participate, you have to know what you can offer to other participants, what you need, and then submit both of those things beforehand.

Note: This preparation session is completely optional. If you have no questions or doubts about the OANM, go straight to the event's main page [\[hyperlink to the main event detail page on the text "the event's main page"\]](#), follow the instructions, and we'll see you there!

### **When**

This lively event will **start at** [\[add your participants' most common time zones here, manually converted so they don't have to \(e.g., "10:30 a.m. PDT / 1:30 p.m. EDT / 19:30 CEST on August 31 \(or 3:30 a.m. AEDT on September 1\)\)"\]](#). If you need to convert the start time to your local time, use one of these two time zone converters: [Time and Date](#) or [The Time Zone Converter](#).

### **What to Expect**

This session will:

- Help you brainstorm what you might offer or need.
- Give you the time and permission to submit your offers and needs.
- Clear up any questions or doubts that you may have after reading the Offers and Needs Market Participant Guide [\[hyperlink to the Participant Guide on the text "reading the Offers and Needs Market Participant Guide"\]](#).

### **How to Join**

[\[Add information about how and where people will participate in the preparation session. For example:](#)

["We'll be on Zoom, so you'll want a webcam, microphone, and a quiet space."](#)

[Click this Zoom room link any time after we're scheduled to begin.\]](#)

### **Just One More Step ...**

I'd be grateful if you RSVPed "Yes" right now so I can plan for a certain number of participants. [\[Add information about how they can easily get the details on their digital calendar \(e.g., "You may also want to use the 'Export' feature on the event detail page to make sure this event makes it on your calendar"\).\]](#)

We'd be sad if the only thing that stopped you from participating was a blind spot on your calendar or the wrong time zone conversion.

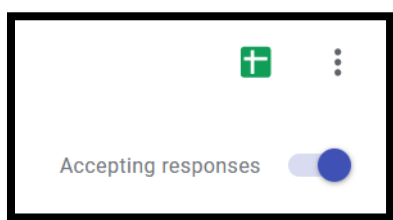
## Questions?

Contact [your full name (e.g., Joel Zaslofsky)] at [your best email address or other common contact method (e.g., myemailaddress@gmail.com)].

## Aggregating, Editing, and Formatting Participants' Offers and Needs

Once you've stopped submissions, it's time to aggregate, edit, and format what participants have sent. **Don't skip this step!** The value to participants is directly tied to how well you edit and present the digital data.

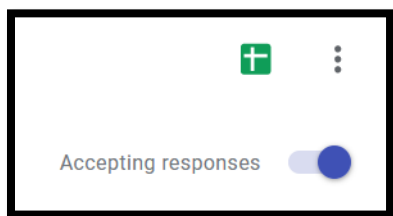
1. Export the data from the [unique Google Forms Offers Capture Survey Template](#).
2. In the Responses section of the form, toggle off the "Accepting responses" option.



3. Copy and paste the exported data into the [Facilitator Master Offers and Needs Capture Spreadsheet Template](#).

*Note:* Make sure the literal "Offer" is used in the "Offer or Need" column for every row you copy and paste into the Facilitator Master Offers and Needs Capture Spreadsheet Template.

4. Export the data from the [unique Google Forms Needs Capture Survey Template](#).
5. In the Responses section of the form, toggle off the "Accepting responses" option.

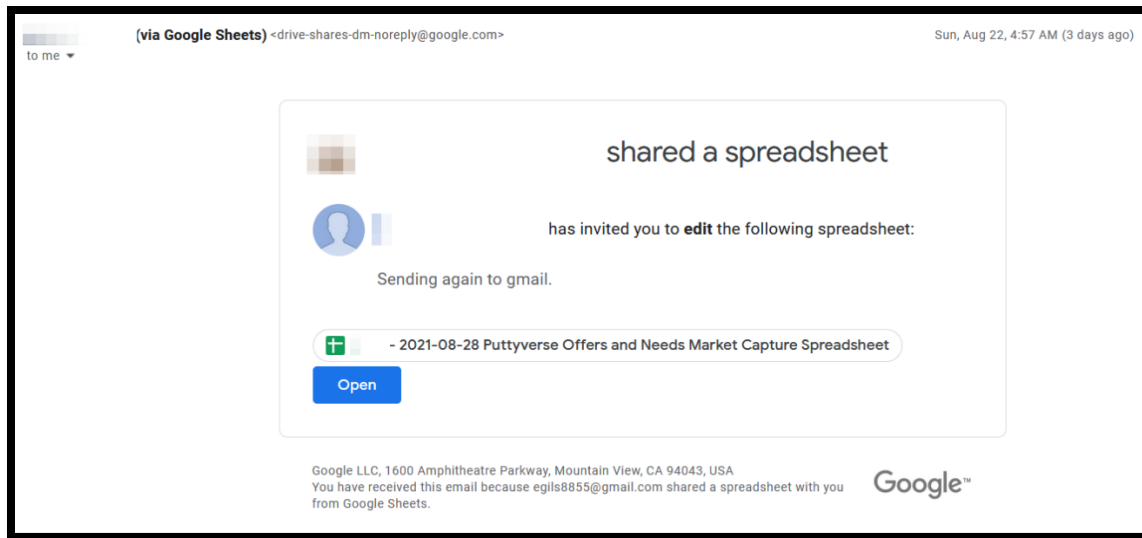


6. Copy and paste the exported data into the [Facilitator Master Offers and Needs Capture Spreadsheet Template](#).

*Note:* Make sure the literal "Need" is used in the "Offer or Need" column for every row you copy and paste into the Facilitator Master Offers and Needs Capture Spreadsheet Template.

7. Copy and paste all the individual OANM spreadsheet submissions that people emailed to you into the [Facilitator Master Offers and Needs Capture Spreadsheet Template](#).





*Note:* Make sure the literal "Need" is used in the "Offer or Need" column for every row you copy and paste into the Facilitator Master Offers and Needs Capture Spreadsheet Template.

8. Add all OANM facilitator offers and needs to the spreadsheet template. Your stuff belongs there, too!
9. (Optional) Add categories and subcategories. If you have more than 100 offers and/or needs in the OANM data capture spreadsheet, add a category for each offer and need. And if you have more than 300 rows, consider adding a subcategory for each offer and need. Sorting and filtering for the win!

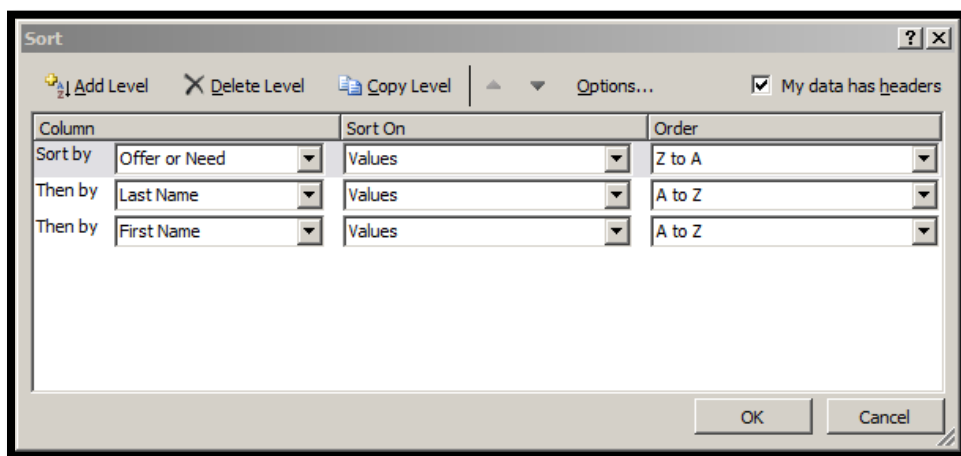
*Pro tip:* Here are some suggested main categories for you to use: Accountability, Advice, Business, Coaching, Communication, Community, Connections, Content Creation, Content Development, Creative, Design, Events, Food, Financial, Habits, Health, Information, Making, Marketing, Personal Finance, Physical, Productivity, Relationships, Research, Resources, Sharing, Skills, Teaching, Technology, Travel, Volunteering, Writing, Other, N/A (Not Applicable).

*Pro tip:* Here are some examples of subcategories for you to use. A more complete list might be hundreds of items long: Art, Blogging, Editing, Entrepreneurship, Feedback, Fitness, Graphic Design, Interviews, Kids, Languages, Mindfulness, Music, Non-Profit, Nutrition, Parenting, Photography, Podcasting, Public Speaking, Referrals, Self-Publishing, Simple-Living, Sleep, Social Media, Stories, Systems, Time Management, Video Production, Website, WordPress, Other, N/A (Not Applicable).

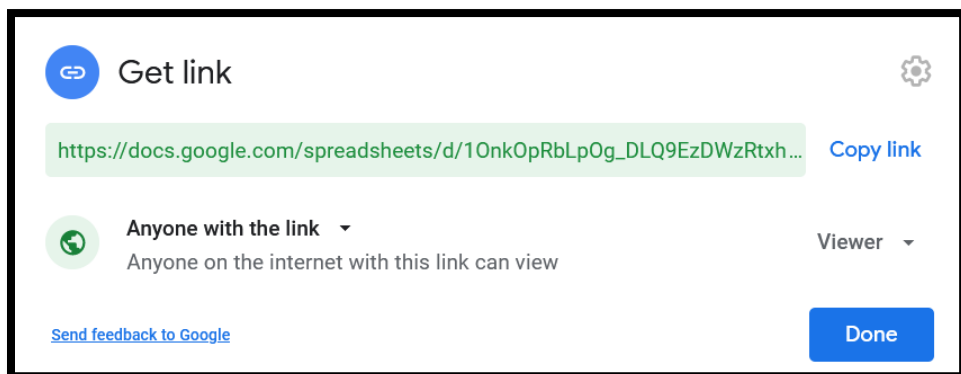
*Note:* Go back through the Category and Subcategory columns and make sure the labels are consistent. For example, you might realize that "Health and Fitness" is too broad of a category and requires separating "Fitness" from "Health." Your "Health" label will also help you decide whether it's too big, even for a master category, or whether it should be divided into "Physical Health," "Mental Health," and "Environmental Health" subcategory labels. Another example is consolidating "Connections," "Connection," and "Connecting" into simply "Connections".

10. (Optional) As you browse and edit the aggregated offers and needs, add people's names in the "Potential Match Person / People According to Facilitator(s)" column if you've identified a potential match. Doing this step will give potential matches greater visibility and an increased likelihood of happening. Delete this column now if you're not going to propose potential matches.

11. Edit offers or needs descriptions that are too long, imprecise, confusing, use acronyms that you can't expect everyone to know, and whatever else is important to you. You might even split one offer or need into multiple ones if they're too long or not associated with each other.
12. Remove extra spaces or correct poor formatting in the various spreadsheet columns.
13. Using the filter drop-down on each column, look for values that are inconsistent (e.g., typos of a person's last name or weird formatting of a phone number) and change them. This is important because any participant may need to sort or filter on any spreadsheet column and data integrity is important.
14. Add required values in certain cells when someone left them blank. For example, someone might leave the Urgency column blank for one of their needs, you'll assess the urgency yourself, then enter the appropriate value (e.g., Semi-Urgent).
15. Run spell check on the spreadsheet.
16. Sort the spreadsheet by Offer or Need column first, Last Name second, and First Name third.



17. If you're not already editing in a Google Sheet version of the spreadsheet, upload your version (e.g., Excel) to Google Drive.
18. Change the Google Drive link access restrictions so anyone with the link (a.k.a. your participants) can view it.



**Note:** I **strongly** recommend view only access so people don't mess with each other's offers and needs or unintentionally mess up your formatting.

19. Distribute the edited spreadsheet however you see fit ([email example](#)) and with whatever number of reminders you want (e.g., a 48 hours and 1 hour reminder).

## Emails Reminders to Participants

I recommend an email reminder to participants (a.k.a. people who did the required preparation work) 48 hours and 1 hour before the live event. But you can adjust the timing and number of email reminders to suit your needs.

### **48 Hour Reminder Email**

*Notes:*

- Use the email address(es) people provided in their submitted offers and needs to test if any of them are invalid or come back rejected. You don't want a participant to contact another participant with a known bad email address if you can help it.
- Make sure all email addresses are on the bcc line.

**Subject Line:** What you need for our [brand associated with the event (e.g., "My Awesome Brand Name")] Offers and Needs Market in [X] hours

### **Email Content:**

Hi wonderful [humans/name the community or group refers to themselves as (e.g., multipotentialites)] who are participating in our [brand associated with the event (e.g., "My Awesome Brand Name")] Offers and Needs Market!

I'm stoked to see you on [date you're running the OANM (e.g., May 19)] at [Start time in the three most common time zones for North America and Europe (e.g., "11:00 a.m. PDT / 2:00 p.m. EDT / 20:00 CEST")]. And since you can clearly follow directions as you already did the preparation work from the event description, here are some other things that will help you get the most from your upcoming experience.

- We'll be meeting [name of online platform you're using to host the event along with a specific link (e.g., "in this Zoom room")].
- The aggregated and edited offers and needs info is in this Google Sheet [hyperlink to the main spreadsheet on the "offers and needs info is in this Google Sheet" text]. It's OK – I want you to sneak a peek. :) It's view only and I'll explain why during the event, plus share some context about how to use the info to its fullest. Feel free to download a local copy so you can edit it, color code it, or otherwise make it easier to use.
- Want to know the general flow of the event and what to expect? Check out page [X] of your participant guide [hyperlink to your participant guide on the "Check out page [X] of your participant guide" text].
- Want to remember what the Offers and Needs Market is all about? The event description will help [hyperlink to your main event ticket/RSVP page on the "The event description will help" text].
- After the real-time market ends, you may want to block off 30-60 minutes on your calendar to start or follow up with any conversations you have about potential matches between offers and needs.

Don't share the [name of online platform you're using to host the event (e.g., Zoom room)] or Google Sheets links with anyone else as they're only for active participants like you. :)

I'm excited we'll be together soon for a great exchange!

[Your preferred sign off]

## 1 Hour Reminder Email

### Notes:

- Use the email address(es) people provided in their submitted offers and needs to test if any of them are invalid or come back rejected. You don't want a participant to contact another participant with a known bad email address if you can help it.
- Make sure all email addresses are on the bcc line.

**Subject Line:** Live in 1 hour: our [brand associated with the event (e.g., "My Awesome Brand Name")] Offers and Needs Market

### Email Content:

Hi again wonderful [humans/name the community or group refers to themselves as (e.g., multipotentialites)] who are participating in our [brand associated with the event (e.g., "My Awesome Brand Name")] Offers and Needs Market!

I'm jazzed to see you in one hour for some great matches and surprising exploration. **Please show up right when we're scheduled to start** so you can get the full experience. :)

Here's some key information so you'll have everything at hand when we begin.

- We'll be meeting [name of online platform you're using to host the event along with a specific link (e.g., "[in this Zoom room](#)")].
- The aggregated and edited offers and needs info is in this Google Sheet [hyperlink to the main spreadsheet on the "offers and needs info is in this Google Sheet" text].
- Feel free to remind yourself of the general event flow and what to expect. It's on page [X] of your participant guide [hyperlink to your participant guide on the "Check out page [X] of your participant guide" text].
- Consider blocking off 30-60 minutes on your calendar shortly after the event ends to start or follow up on any conversations you're about to have about potential offers and needs matches.

Remember: don't share the [name of online platform you're using to host the event (e.g., Zoom room)] or Google Sheets links with anyone else as they're only for active participants like you. :)

Get ready for a great exchange starting in one hour!

[Your preferred sign off]

## Marketing Your OANM

Often, you'll need to have a concise description of what your OANM is, how it works, what people need to do to prepare, and how people benefit when they participate. Whatever you do, emphasize that OANMs work best when people learn about them in advance and to *only* come to the market if people have done the prep work.

Here's a template below that you can tweak for length, style, and your unique needs. Add some images and mix up the styling of the text (e.g., block quotes) to provide some visual interest.

### OANM Event Description Template

#### *Event Title*

The Offers and Needs Market: **[Your Subtitle Here If You Want One]**

#### *Event Summary (If Necessary)*

- Where talents are treasures and desires are delivered
- Where kindness is currency and community is wealth
- From "I need" to "we have" – building together/together we thrive
- What you offer matters – what you need is valued
- Small exchanges, big connections, stronger communities
- Give what's useful and get what's necessary
- A lively exchange of skills, support, and serendipity
- A joyful way to give, receive, and thrive
- Reimagining wealth, one connection at a time
- Reclaim the joy of giving and receiving
- Communities built on trust, not transactions
- A simple way to create abundance together

#### *Event Description*

The Offers and Needs Market (OANM) is a lively, guided exchange where groups swap skills, stuff, and support – anything from tech help to a new mindset to the food on your plate. Whether it's free, bartered, or paid, it's all about better knowing that **what you offer matters and what you need is valued**.

This event will **start at [add your participants' most common time zones here, manually converted so they don't have to (e.g., "10:30 a.m. PDT / 1:30 p.m. EDT / 19:30 CEST on August 31 (or 3:30 a.m. AEDT on September 1))"]**. If you need to convert the start time to your local time, use one of these two time zone converters: [Time and Date](#) or [The Time Zone Converter](#).

#### **What to Expect**

The OANM has helped participants find work, a place to live, meet new friends, and discover a deeper sense of belonging. Every exchange **builds connections**, those connections weave **stronger communities**, and more trust creates **more possibilities**.

It's also a fun way to flip the script on scarcity. No more "We don't have enough" blues! Instead, let's celebrate what we *do* have, showing how we can **help – and get helped – right now**.

## Required Preparation

Want in? **Complete the prep work at least 72 hours before the market starts.** Otherwise, showing up will be a waste of your time.

1. Read and take action on *all* of the [Offers and Needs Market Participant Guide](#).
2. Add all of your offers and needs in [this Google Sheets template](#). If you prefer using forms to spreadsheets, you can use this form for offers [\[Add unique hyperlink on "use this form for offers" text from the copy you made in this step\]](#) and use this form for needs [\[Add unique hyperlink on "use this form for needs" text from the copy you made in this step\]](#).
3. If you use the Google Sheets template, email me the link [\[Add hyperlink to your email address on the "email me the link" text\]](#).
4. Add a reminder to your digital or physical calendar so you remember to show up. :)

If you want more details about the OANM, feel free to [explore here](#).

Are you looking for inspiration? [Here's a spreadsheet with real examples](#) of offers and needs from various gatherings.

[\[Oh, and consider bringing a friend or two and uncover surprising ways to connect.\]](#)

## Notes about RSVPs

[\[Add information about how to RSVP, notes about the capacity for the event \(e.g., the first 100 people\), or anything else about RSVPs\]](#)

## How to Join the Live Market

[\[Add information about how and where people will participate live. For example:](#)

["We'll be on Zoom, so you'll want a webcam, microphone, and a quiet space."](#)

[Click this Zoom room link when we're scheduled to begin and join us for some surprising exchanges!\]](#)

[\[I'll send the Zoom link via email at least one day in advance of the market.\]](#)

## Just One More Step ...

I'd be grateful if you RSVPed "Yes" so I can plan for a certain number of participants. [\[Add information about how they can easily get the details on their digital calendar \(e.g., "You may also want to use the 'Export' feature on the event detail page to make sure this event makes it on your calendar"\).\]](#)

Don't let a blind spot on your calendar or the wrong time zone conversion keep you from this unique experience!

## Questions?

Contact [\[your full name \(e.g., Joel Zaslofsky\)\]](#) at [\[your best email address or other common contact method \(e.g., myemailaddress@gmail.com\)\]](#).

## ***OANM Testimonials***

If you feel like it'll help, you can use any testimonials you find on my [OANM landing page](#) or link people to [the offersandneeds.com The Impact page](#).

## **Social Media Share Templates**

### ***Facebook / LinkedIn / Other Social Media***

Join us on [Date of event (e.g., "March 13")] for the online [brand associated with the event (e.g., "My Awesome Brand Name")] Offers and Needs Market (OANM).

It's a lively, guided exchange where groups swap skills, stuff, and support – anything from tech help to a new mindset to the food on your plate. Whether it's free, bartered, or paid, it's all about better knowing that **what you offer matters and what you need is valued**.

[Add link to event detail page]

The OANM has helped participants find work, a place to live, meet new friends, and discover a deeper sense of belonging. Every exchange **builds connections**, those connections weave **stronger communities**, and more trust creates **more possibilities**.

It's also a fun way to flip the script on scarcity. No more "We don't have enough" blues! Instead, let's celebrate what we *do* have, showing how we can **help – and get helped – right now**.

### ***X / Twitter***

Join us for a highly interactive online event on [Date of event (e.g., "March 13")] [I/we] call it the Offers and Needs Market. Intriguing, right? :) It's where talents are treasures and desires are delivered, where kindness is currency and community is wealth. [Add link to event detail page]

## **Who to Invite**

The OANM is for *everyone*, so consider these just the very tip of the iceberg. Your imagination and connections are the only limits here!

- Friends and family. Start with the people you already know and who already trust you. Mutual respect, shared experiences, and solid communication make for fertile ground to find participants.
- Groups, organizations, and communities you are or have been affiliated with. This could be online/offline work places, secondary and post-secondary education (e.g., high schools, community colleges, or school to work programs), maker spaces, or religious and spiritual groups (e.g., churches or yoga groups).
- Aligned meetup groups. Websites like Meetup.com or Facebook groups are great for finding existing local groups that might enjoy OANMs, too. Depending on your context, searching for these types of keywords or phrases can pay off quickly: barter, gift economy/exchange, community, time bank, or alternative economies.
- Anyone who self-identifies as generous, curious, or kind.
- Unemployment centers or other places where people may need to find work.
- Local journalists (who might want to give you some publicity before or after the OANM).

## When to Run an OANM

OANMs are versatile and work any time of the day, week, month, or year. If you're running one as part of a bigger event (e.g., conference), here are some tips on optimum timing:

- 1-day event: Run it right after the welcome/event introduction. OANMs make for great icebreakers, plus set a generous and candid tone.
- 2+ day event: Run it as early as possible on the second day. Participants should already be in an open mood and a bit more willing to offer or ask for help with people they know better.

*Pro tip:* Poll people to determine their ideal day and time. Instead of guessing when people can show up, find out with a poll from a free service like [Xoyondo](#) or [Doodle](#).

## Reminders

Send reminders to people who RSVPed or haven't responded to your invite yet. Some people need a surprising number of reminders before they act (and often appreciate each one). So share your details or a link to RSVP two weeks out or any number of days that allows people to do your prep work and hit any prep work deadline you set for them. It can be on social media, via a direct email/text/phone call (often the most effective option), through your email distribution list, or however else you like.

Just make sure each reminder contains the key information from the event description, the level of advanced commitment people need to make, and any specific deadlines for RSVPing or doing the pre-work.

### *Example Reminder One Week Out*

*Note:* If possible, the distribution list for this email should exclude anyone who has:

- Already emailed their offers and needs to you or filled out the Google form with their offers and/or needs.
- Canceled their registration or updated their RSVP to "No".

If you don't have the ability to filter out people who don't need to get the email, adjust the content to reflect that this message is going out to everyone – regardless of whether they've already submitted what you need or regardless of their registration / RSVP status.

*Note:* Make sure all email addresses are on the bcc line.

**Subject Line:** Complete your [brand associated with the event (e.g., "My Awesome Brand Name")] Offers and Needs by [submission deadline date (e.g., May 16)] to participate

### **Email Content:**

Hey wonderful [humans/name the community or group refers to themselves as (e.g., multipotentialites)] who [reserved a ticket/RSVPed] for my [brand associated with the event (e.g., "My Awesome Brand Name")] Offers and Needs Market on [date you're running the OANM (e.g., May 19)]!

I know some of you [registered/RSVPed] over [X days/weeks] ago at this point. However, if you're getting this email, that means I don't have offers and needs from you yet. And you'll need to **complete them by [submission deadline date (e.g., May 16)]** to participate in the live market.

The details about what to do are in the "Required Preparation" section of the event listing [Add a hyperlink to the event registration/RSVP page on the anchor text "'Required Preparation' section of the event listing"]. The



average prep time is between 15-30 minutes, so please carve out the space in your schedule to make it happen for yourself. :)

I don't want the chance to slip away and have you miss out on the exchange!

[Your preferred sign off]

## Day of Market Facilitator Preparation

### Open Key Digital Files

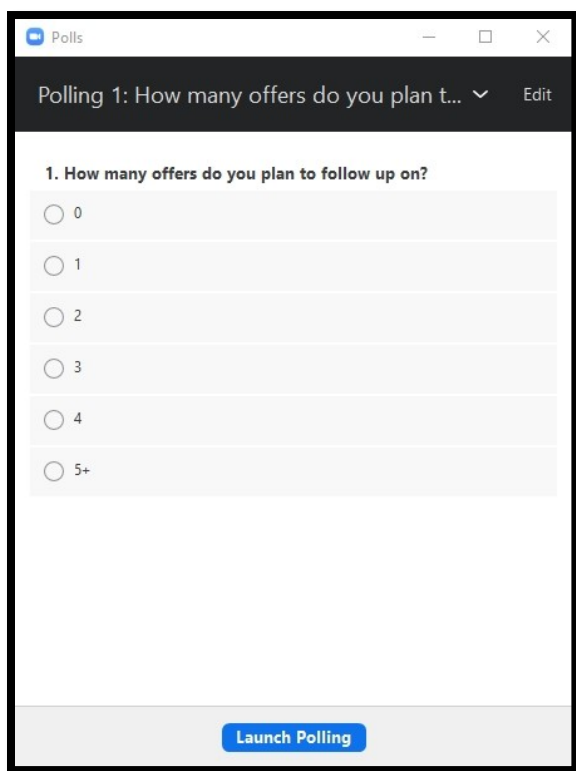
You'll want to have these examples and templates open in your browser ahead of time so you don't have to fumble to find them when you're facilitating the OANM.

1. The aggregated Offers and Needs Market spreadsheet in Google Sheets format.
2. The [real-time survey](#).
3. A digital copy of the [participant instructions](#).

Get the Participant Instructions

### Get Any Pre-Populated Polls Ready to Go

Some facilitators like to poll their participants in real-time via a video conferencing platform. For example, you might ask how many offers and/or needs participants plan to follow up on.



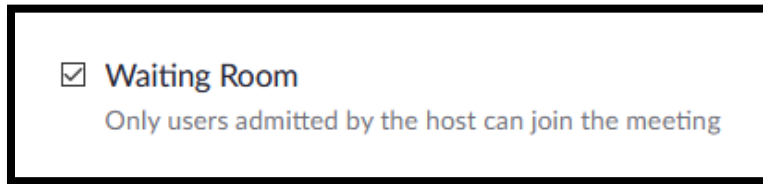
The screenshot shows a Zoom Polls interface. At the top, there's a header bar with the Zoom logo and the word 'Polls'. Below that, the poll title 'Polling 1: How many offers do you plan to follow up on?' is displayed, followed by a dropdown arrow and an 'Edit' link. The main area contains the poll question '1. How many offers do you plan to follow up on?' and a list of radio button options: 0, 1, 2, 3, 4, and 5+. At the bottom of the interface is a blue button labeled 'Launch Polling'.

If the video conferencing tool you're using allows for polls, make sure that you've preloaded the poll information to the administrative back-end. That, or ask the people/host/moderator of the event to add the poll information for you.

For example, in Zoom, you would set up the polls at [https://zoom.us/meeting/\[MeetingID\]](https://zoom.us/meeting/[MeetingID]). If you have the polls configured in your own Zoom account but you're using someone else's Zoom account for the OANM, they'll have to configure the polls in their Zoom account, too.

## (Optional) Turn on the Waiting Room Option for Your Video Platform

You generally don't want participants entering your video room before you do or before you're ready to officially start the market. So turn on any kind of waiting room option to prevent people from joining before you want them to.



## Load Images for Screen Sharing

If you have images you plan to screen share at some point – either locally on your device or on some online web page – load/access them now so they'll be at your fingertips later.

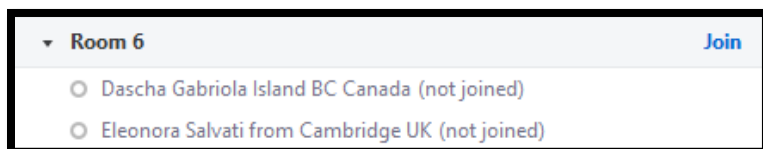
For example, you might have an event overview document that shows people the order and rough timing of each part of the real-time market.

## Configure Your Breakout Rooms

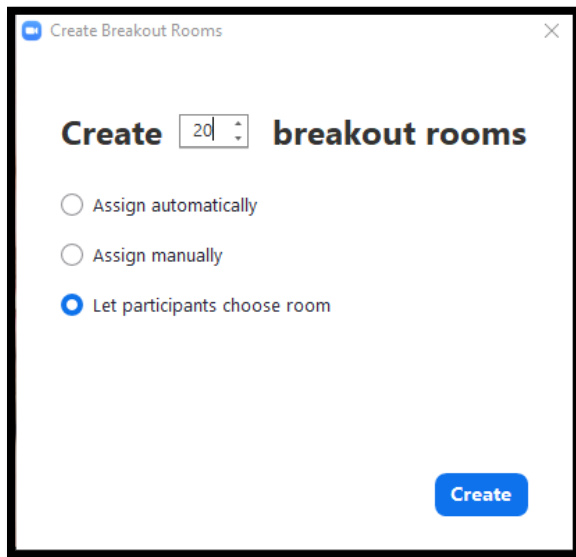
Save yourself the headache of setting up breakout rooms in real-time and do them in advance. :) Here's a rule of thumb to use when setting up the breakout rooms:

Number of people you expect at the OANM x 2/3.

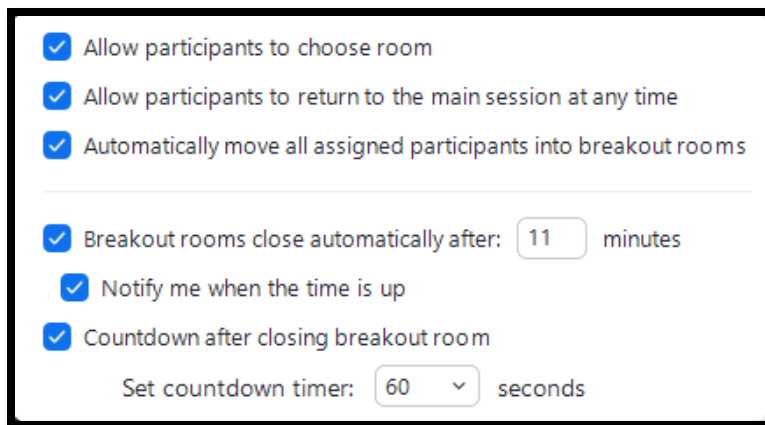
Example: 60 people come to the OANM and you make one-to-one breakout rooms for 2/3 of them. That means 40 total breakout rooms since many of them won't be in use at any given time. It may seem excessive, but Zoom keeps people (greyed out) in a breakout room even after they leave which makes it confusing for people to know whether the room is open or not. The more clearly empty breakout rooms are available without making it excessive, the better.



## Zoom Breakout Room Configuration



1. Click the "Breakout Rooms" option
2. Enter the number of rooms you want in the "Create [X] breakout rooms" number box.
3. Select the "Let participants choose room" option.
4. Click the "Create" button.
5. If necessary, rename each room "Room 1", "Room 2", "Room 3", etc.
6. Click the "Options" button.
7. Use the following options
  - a. Allow participants to choose room = checked
  - b. Allow participants to return to the main session at any time = checked
  - c. Automatically move all assigned participants into breakout rooms = checked
  - d. Breakout rooms close automatically after [X] minutes = **[Whatever time you've allotted for the [Exchanging Offers and Needs portion](#) of the event]**.
  - e. Notify me when the time is up = checked
  - f. Countdown after closing breakout room = 60 seconds

A screenshot of a settings interface for breakout rooms. It features a list of six options, each with a blue checkmark icon. The first three options are grouped together. The fourth option includes a numeric input field set to '11' and the word 'minutes'. The fifth option is a simple checkbox. The sixth option includes a label 'Set countdown timer:' followed by a dropdown menu set to '60' and the word 'seconds'.

- ☒ Allow participants to choose room
- ☒ Allow participants to return to the main session at any time
- ☒ Automatically move all assigned participants into breakout rooms

---

- ☒ Breakout rooms close automatically after:  minutes
- ☒ Notify me when the time is up
- ☒ Countdown after closing breakout room

Set countdown timer:  seconds

## Set Up Your Physical Environment

You may not need these tips depending on your facilitator experience and tech savvy. But even Internet audio and video veterans could use some key reminders.

- **Be available early.** Being ready even five minutes before the scheduled time lets you work out any kinks or finalize any logistics.
- **Be in a quiet room with little background noise.** Think about fans, rustling clothing, dangling necklaces or bracelets, and open windows. Also, do your best to quiet pets or silence any electronic devices that might make sounds (e.g., cell phones, computer notifications, alarm clocks, etc.).
- **Avoid jargon and explain terms or acronyms.** Assume the participant doesn't know what you know or may not understand what you're talking about.
- **Wear headphones.** Your co-facilitators will hear you better and it will eliminate any echo or reverb from your speakers.
- **Test your hardware, software, and settings.** For example, configure your software to use the best microphone available if you have multiple. If you haven't used specific hardware or software in a while, check to see if you have the latest drivers or version installed.
- **Have water handy.** You never know when your throat will get dry or a frog will jump in it.
- **Rename yourself.** Match the format you want your participants to use (e.g., Full Name / City, State, and Country or First Name)
- **Get music ready** if you're going to have it in the background or use it as a transition from one phase of the event to another.
- **Remind the host to press the "Record" button** (if you're recording the market).

## OANM Real-Time Process

### As the Participants Join with Real-Time Video

It's always good to get participants warmed up before the structure kicks in. Here are some tips to get people engaged with you and each other:

[If you're playing some music to energize people or set the mood for the event, start it now.]

[Say hello, with their name, to some people who have already joined. It gets their attention and makes them feel seen.]

"Over the next [amount of time together (e.g., "two hours")], we're going on a collective treasure hunt – digging up the incredible gifts, talents, and resources hidden in this [group/community]. You might even be surprised by what you learn about people you already know."

"[I/II/we/II] be guiding you through a process that's been happening, in one form or another, since the dawn of humanity and, more recently, around the world as the Offers and Needs Market."

"In a world full of impersonal exchanges, this is a refreshing change: a chance to connect, share, and discover on a human level. We already have so much of what we need waiting right beneath the surface; it just takes a little structure and serendipity to share it."

"Now, I'd like you to close your eyes. [Pause a few seconds.] Imagine you're on bus with your fellow participants, heading somewhere exciting, yet still unknown. You've just pulled into a parking lot and what awaits you are clues that point to your future well-being and our collective abundance. Each offer and need laying around the landscape is a small piece of a larger map designed to weave us together – where talents are treasures and desires are delivered ... where kindness is currency and community is wealth."

"Can you feel the possibilities in the air? Do you sense the generosity and creative force blowing in the wind? The sun is shining and so are we as you remember that what you offer matters and what you need is valued."

"Slowly open your eyes and take in the names, faces, and energy of these people who came here to discover alongside you."

[Ask people to rename themselves in Zoom with the name they provided when they wrote down their offers and needs and their current location (e.g., Joel Zaslofsky – Edina, Minnesota, USA). Changing their name in Zoom to match the name they gave when they wrote down offers and needs will make it much easier for people to reach out to them to start a conversation about one of their offers or needs.]

"If necessary, now's the time to digitally rename yourself to match the name you provided when you sent me your offers and needs. This will make it much easier for your fellow participants to start a conversation. Feel free to check out how I've provided my name and something optional, like a location, as an example."

[Copy and paste the text below into the video room chat]

Here's a quick article on how to rename yourself using the Zoom desktop program or mobile app:

[https://support.zoom.com/hc/en/article?id=zm\\_kb&sysparm\\_article=KB0061891](https://support.zoom.com/hc/en/article?id=zm_kb&sysparm_article=KB0061891).

"If you don't remember what name you provided, here's a link to the spreadsheet that has everyone's offers and needs. Find one of your rows and use that same name."

[Give people a link to the aggregated and formatted OANM data capture spreadsheet. Copy and paste the text below into the video room chat]

[Name of document: [hyperlink](#)]

"If you're not already using a laptop or desktop, you might consider switching to one if that's an option. Using spreadsheets or seeing things in the chat right away will be a lot easier with a decent sized screen."

[Tell people who didn't do the prep work to leave (now please)]

"If you haven't already given me your offers and needs before our event started, I kindly ask you to leave. Sticking around without having done the prep work will be a waste of your time and drain energy from the market itself."

[If necessary, explain the chat or video features of the platform so people know how to interact with you (the host/facilitator) or their fellow participants.]

[Introduce yourself or prompt co-facilitators to introduce themselves with whatever level of detail or context seems relevant. For example, "For those of you who don't know me, I'm ... and I'm ..."]

"Now let's see if anyone has time constraints for the [X number of minutes] minutes we plan to be together. If you know or think you have to leave before we're officially done, let us know your limitations in the chat so we can do our best to accommodate you."

[Invite participants to share their mood and energy right now in the chat.]

"I find it helps to make it known what your mood or energy level is coming into this experience. If you like, type how you're feeling in the chat and we'll pause for about 30 seconds to give everyone time to check in with themselves."

[Pause for 30 seconds and let people type in the chat. This is an engagement exercise and to prime people to pause for reflection and use the chat.]

[Talk about your goals for the OANM. For example:]

"If you're curious about why I take the time to run these OANMs, I want to help you all discover, elevate, and distribute all the untapped potential and generosity in the [community name] community. I also want to connect you with some awesome people in the community you might not otherwise learn about or have a reason to chat with. There's more, but I'll leave it at that for now. :)"

[Give the participants an overview of the segments of the market (with a visual screen shared image of the segments if possible).]

"So, how's our time together today going to work? First, I'm going to cover some brief housekeeping items with some pro tips sprinkled in. Then we'll take about [X minutes for the offers and needs exchange portion] to have one-on-one conversations with people we see a potential match with. There will be other things to do if you'd rather not go into a breakout room. :) Next, we'll match up some select offers and needs in real-

time, debrief with a short survey, and have a group reflection about the experience. The whole thing should take about [X minutes for the rest of the overall process], starting now."

[Give people fifteen seconds to think about *burning* questions they have about the process and then type the letter "q" in the chat if they have one. Unmute people who have questions, let them ask, and answer as concisely as possible. This should only take 1-2 minutes or you'll get bogged down before you even started.]

"If you have a *burning* question that simply must get addressed now for you to make the most of this OANM, type the letter 'q' into the chat. We have time for two to three quick questions and quick answers if necessary."

[After fifteen seconds of silence, move on.]

"Alrighty. Let's do some brief housekeeping."

### Housekeeping Notes



Acting upon these housekeeping notes makes for a better and more valuable experience for everyone:

Let's level up your experience with a few pro tips, the kind that might be the difference between "decent" and "Wow."

First off, feel free to step away at any time. Grab a snack, go pee, you know – handle life. There's no official break, so listen to *your* needs. Stay as long as you can for the full magic, but leaving early is totally fine.

This online space mirrors how I run in-person OANMs, so patience is key. If someone's deep in conversation in a breakout room, think of it like two people chatting in the corner at an offline event. You wouldn't just jump in, right? Trust the flow, even if it feels a little slow.

I'll also pause sometimes. Like, really pause. It's intentional! It gives space for quieter folks, non-native English speakers, people who need more time to process, and everyone to reflect before we move on.



Mute and unmute as needed, but heads-up: I might mute you if something in your environment is distracting others. It's your call to have video on or off, but we love seeing faces! Matching and chatting are just more fun that way.

Last, for now, does anyone have specific accessibility needs we should know about? For example, someone to read you text that you can see or process in the chat?

[If people speak up and say they have a specific accessibility need, see if you can find a participant in real-time to be their designated helper]

"The OANM is both a community-building and trust-building activity. We assume that everyone has good intentions and nobody's offering or vulnerability in sharing their needs will be taken advantage of. In other words, *what we offer each other shouldn't and won't be exploited*.

"Speaking of matches ... have the aggregated offers and needs spreadsheet handy at all times. I'm putting a link to it in the chat now so go ahead and open it up."

[Give people a link to the master OANM data capture spreadsheet. Copy and paste the text below into the chat]

[Name of document: [hyperlink](#)]

"You'll notice that the Google Sheet is in view only mode for you and that's intentional. Adding, deleting, or otherwise editing the Google Sheet during our limited time together is often distracting for all of us."

"Before we get into exchanging offers and needs, let's get our bodies and brains loose first. Let's take one minute to do some breath work, shake out your body, or otherwise do whatever will help you stay as present as possible with us for as long as possible. I'm going to wiggle and waggle my body a bit while I do some deep breathing, but you can do whatever you like."

[Let participants do breathe work, shake it out, or whatever they need to do for one minute]

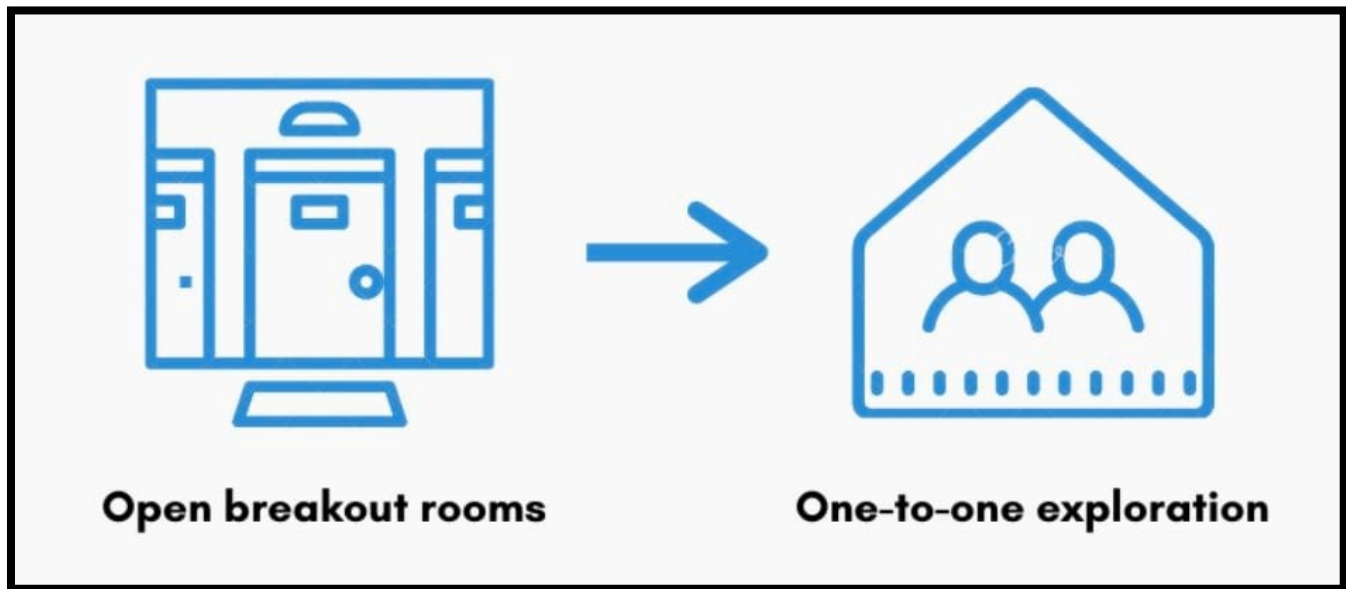
"Ahhhhhh. That was nice. :) You have permission to reset at any point by doing more breath work, moving your body, or whatever else feels good. We won't think it's weird. :)"

## Welcome People Who Joined after the OANM Officially Started

[Name the people who you didn't verbally say hello to at the start of the OANM that joined later so they feel welcome and so that they know *you* know they're there (which helps them stay focused on the OANM). An example:]

"Hi [\[first name\]](#) and [\[first name\]](#)! As I see you joined us a little bit later than some others, which is cool, there's time to catch up on anything you missed right when we started. For anyone else who recently joined this Offers and Needs Market, welcome! Feel free to type the word "New" into the chat so we know you're as engaged as everyone else – and maybe we'll even say hi. :) We just discussed the spirit that guides our OANM, ran through some housekeeping notes, and are about to get into exchanging our offers and needs. Exciting, right?" :)

## Exchanging Offers and Needs



*Note:* I strongly recommend you allow at least 45 minutes for the real-time exchanging of offers and needs. 60 minutes or more might be even better if you and your participants have the time. It's not uncommon for two participants to go into a breakout room and take 15+ minutes to discuss one offer or need. Allowing for that in-depth conversation to happen a few times is great for participants if you can accept the overall longer real-time market tradeoff.

### Overview

"OK. Do you have the aggregated spreadsheet open that has everyone's offers and needs? If not, I'm putting the link in the chat again and you should open it up now."

[Give people a link to the aggregated and formatted OANM data capture spreadsheet. Copy and paste the text below into the video room chat]

[Name of document: [hyperlink](#)]

"Don't dive into everyone else's offers and needs just yet! I know – it's tempting. But stick with me for a few more minutes."

"Here's some quick context to make your experience smoother. I edited some of the information you gave me – mostly small edits for clarity, but sometimes bigger ones like explaining terms or standardizing formats. If I messed up, send me a private chat message and I'll do my best to make it right."

"I also added a "Potential Match" column with my best guesses on who might click. If you see your name there, it's probably worth reaching out! But don't just jump on the first match you spot. Prioritize who you want to connect with most."

To speed things up, use spreadsheet filters to sort by location, exchange method, or whatever matters most. I'm linking a Google Docs resource so you can quickly learn how. Oh, and don't worry: filters only affect your view!"

[Copy and paste this in the chat]

How to filter a Google Sheet: <https://support.google.com/docs/answer/3540681>

"I'm about to open up a number of Zoom breakout rooms for you to jump in and out of to discuss a potential match with another participant.

"As we're about to exchange some awesome stuff in real-time, here are your options right now:

- a. If you haven't already, take some time to review the offers and needs spreadsheet.
- b. Find someone you want to speak with.
- c. Direct message them in Zoom and invite them to join you in a specific numbered breakout room. Remember: You can't message someone if they're already in a breakout room and they otherwise might not see it right away. Be patient. Also remember that people may be sending *you* private chat messages when you're not looking at the Zoom chat.
- d. Keep messaging and hopping into breakout rooms until the real-time exchange portion of the market ends. **[Tell people how long that will be]**.
- e. If you're not ready to speak with anyone at some point, plan your follow-ups for later.
- f. I'll stay in the main Zoom room to answer questions, help assign people to breakout rooms if they can't do it themselves, and make sure things are flowing smoothly.

**[Type the summary of the process into the chat with the text below]**

- \* Take some time to review the offers and needs spreadsheet.
- \* Find someone you want to speak with.
- \* Private message them in the chat.
- \* Pick a breakout room that's empty and join your potential match in it.
- \* Plan how and when you're going to follow up with people.
- \* Use this main Zoom room to ask me questions or ask each other questions.

"What I just typed into the chat will follow you into a breakout room."

"If you have a *burning* question about the process, type a "q" into the chat and I'll field up to three of them quickly."

**[Take 15 seconds of silence for participants to ask questions before moving on].**

"OK. I'm starting my timer for **[X minutes that the real-time exchange process will last]**. Connect, discuss, exchange, and explore everyone! We'll then meet back in the main Zoom room to give each person a chance to spotlight an offer or need to the whole group, give real-time feedback, and do a group reflection about your OANM experience. The breakout rooms are about to be open ... enjoy!"

**[Click the "Breakout Rooms > Options" button to verify that your initial breakout room settings are still applied. Be sure to verify the "Breakout rooms close automatically after X minutes" option to make sure it's the right number of minutes].**

**[Click the "Breakout Rooms > Open All Rooms" button to open the breakout rooms].**

[Start your personal timer for the amount of time people are in breakout rooms.]

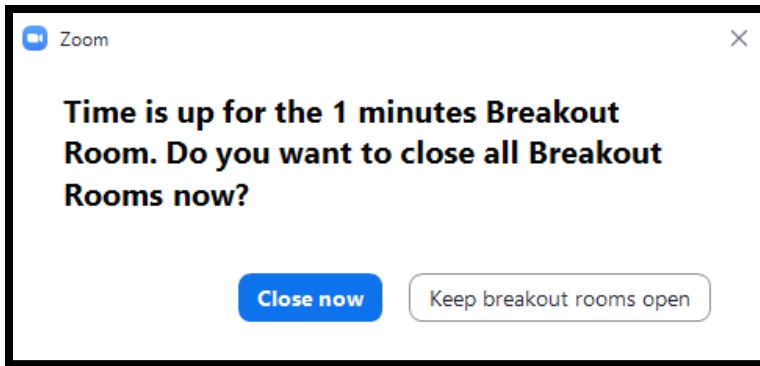
## Facilitator Actions While People Are in Breakout Rooms

[Start a timer for 12 minutes (or whatever total length of time you want for each breakout room round) to prompt yourself to broadcast a message to everyone in breakout rooms. It can say something like "If you're still in your original breakout room, consider wrapping up your chat so you can try for another match."]

[Start a second timer to give people a five-minute warning through the video platform when you're going to bring everyone back into the main room from their breakout room.]

"We'll be gathering back in the main Zoom room in five minutes."

- Just let the breakout room timer count down until you're prompted with this dialogue option:



**Note:** Don't navigate away from Zoom or you might miss the dialogue box prompt to close the breakout rooms.

- Click the "Close now" button to start the countdown timer (60 seconds) until everyone is forced back into the main room.

## Facilitator Actions after Each Breakout Room Round

- If you're using Zoom: in the Zoom breakout room panel, click the "Recreate" button. If you don't, people will be asked by Zoom to go back into the room they were just in when you click the "Open All Rooms" button again. Avoid this as it's confusing.
- When you're ready to open another round of breakout rooms, just follow the steps in [configure your breakout rooms](#).
- (Optional) After the 3rd or 4th round of breakout rooms, consider doing a real-time exercise to see how many more people each participant wants to speak with. There are many ways to do it, but my favorite is a "show of fingers." Ask each participant to hold up the number of fingers on their hand(s) representing how many more people they'd like to speak with about a potential match. People who can't use or don't want to use video can just type a number in the chat. This will let you know if you should end the round of breakout rooms earlier than you planned so the gathering doesn't needlessly drag on.

## Facilitator Actions Once All Breakout Room Rounds Are Done

[If you're playing some music to re-energize people or set the mood for the next phase of the event, start it now.]

"I want to acknowledge that some of you didn't get a chance to talk to as many people as you hoped to connect with about a specific offer and need. That's a bummer, and the good news is you can still contact people after our time together here is done. Please, please – don't let a good offer or need go unaddressed."

"Before we get into shining a spotlight on some of you, an insightful survey, and some group reflection, let's get our bodies and brains loose again. Take another minute to do some breath work, shake out your body ... whatever you feel called to do right now."

[Let participants do breathe work, shake it out, or whatever they need to do for one minute]

"I know you have another meaningful minute in you. Let's now take a silent minute to plan how and when we're going to contact someone or follow up about a potential or real match you have. I'm hitting the pause button now for you to put your mini action plan together."

[Be silent for one minute]

[(Time allowing) Ask people to put a "y" in the chat if they'd like to verbally share a particularly interesting or resonant offer they matched with (3 people max).]

## Spotlighting, Survey, and/or Group Reflection



### Spotlighting (Optional)

[Allow each participant to verbally pitch *one* of their Offers or Needs. If they can't verbally pitch because the tech platform doesn't allow it or they're not able to speak, prompt them to enter it into the chat. Tell people to add their contact information in the chat after they've spotlighted their offer or need.]

"Now's your chance to spotlight one standout offer or need – something that deserves extra attention."

"If you resonate with a spotlight item or you know someone who'd be a great match, direct message them with your contact info. There's no need for extra details. Just give us the offer or need itself. Keep it snappy!"

[Model the concise pitch with one of your example offers or needs.]

"I'll model how this is supposed to work. I'm Joel Zaslofsky and I offer to help you create minimalist spreadsheets without fancy formulas. Now I enter my contact information in the chat [enter information in the chat] and I'm done."

[Don't allow discussion or clarification during this step unless you have lots of time. It'll slow things down or allow extroverts to dominate the conversation.]

"That was it. Simple and quick, right? If you want a discussion about or clarification of someone's offer or need, do it privately so we can keep things moving along."

"If you want to spotlight *one* of your offers or needs, type the letter "y" in the chat. We'll spotlight as many as we have time for."

[Have people unmute themselves and do a round of spotlights, pointing out when someone is going too long or not following your instructions.]

[While they're doing spotlights, consider taking a screen shot of all participants or just the ones who have their video turned on.]

## Real-Time Survey

When you carve out intentional time during the overall OANM process to survey participants, the response % and usefulness ratio of the feedback is much higher than if you ask people to fill out a survey after the market is already over. Whatever survey you ask people to complete should take seven minutes or less (on average), preferably five minutes or less.

Some people incentivize survey completion by giving a reward to one or more people who complete it (e.g., a free consultation, access to your normally private resources, etc.). Decide ahead of time if you'll have a reward, how many, and what type.

[Explain to participants why your survey is so important that you've carved out time during the event to fill it out in real time.]

"Now for everyone's favorite part of the OANM: the real-time survey. :) I promise it's quick, insightful, and useful for both you and me. Some of my best changes to the OANM have come from past participants like you – generous and candid. So, if you've enjoyed this, or have ideas to make it even better, drop your thoughts in the survey link I'm about to share."

[If you have some kind of reward, mention the details now.]

[Share the unique survey link in the chat.]

End of OANM Survey: [add link]

"You have **seven minutes** but it'll probably take less. No worries if you don't finish now. Just wrap it up later when you can. The timer starts ... now!"

[Set timer for seven minutes]

[Give people a verbal one-minute warning when the official survey time is almost up]

[Let people know the official survey time is over, but they can complete it later if they didn't get to finish]

## Reflection Time

[Give people 30 seconds each to reflect on what you've just experienced.]

"Let's reflect before we wrap up. Sharing your experience or hearing others' can boost confidence and spark new insights. Take up to 30 seconds to share your thoughts and I'll put some reflection prompts in the chat if you need inspiration."

"Let's hear what stood out for you!"

[Copy and paste the text below in the chat]

- \* What's something that surprised you about the experience?
- \* What did you learn about yourself or others through participating today?
- \* Did your self-identity change in any way during the OANM, even a little?
- \* How did the process challenge you?
- \* Did you find it easier to reflect on and share offers or needs?
- \* What are you excited to follow up on because of our OANM?

"Let's silently pause for one minute to gather our thoughts and then we'll share together."

[Set a timer for one minute and be silent]

"It's been one minute. If you have something you'd like to reflect on with the group, put a "y" in the chat. We might not get to everyone, but as always, I'll do my best to move things along without rushing us."


[As people type a "y" in the chat, call on them to verbally share for as long as you have time for]

## End the Event

In general, you're just recapping what you promised to do as follow-ups and expressing gratitude for any co-facilitators, tech helpers, and participants who made this OANM special. Here are some things you could mention:

- Recap the spirit of the OANM (based on generosity and connection).
- Give an example of something that just happened in this OANM that reiterates why you love OANMs.
- Explain how and when you'll follow up with participants, and in what medium.
- If applicable, remind participants that they can share any matched or unmatched offers and needs with the wider community in whatever way they see fit.
- If you have co-facilitator(s) or other people who helped you prep for, host, sponsor, or run the OANM, thank them for helping.
- Thank your participants for showing up for themselves and their community.
- Prompt people that they can run their own OANM and you can contact me or go to X website to learn how.
- Give people permission to leave now.
- If you want, go into the bonus round – a.k.a. anything goes conversation or nerding out about the event experience of themes of the event – do it.
- End the meeting for everyone by closing out the video platform.

## Administrative Steps After Ending the Event



### Post-market

Follow up with participants, share any updated offers and needs, and plan your next Offers and Needs Market!

You've given everyone a great gift. Woohoo for you!

You may have done some temporary or one-time administrative steps to set up the event that you now need to undo or otherwise change. For example, turning off a waiting room option on your video platform if you normally don't use that feature.

Whatever you need to do or undo, here's your prompt to do or undo it. :)



## The Follow-Up

### Edit the Master Spreadsheet

If any participants asked to add, edit, or delete any of their offers or needs – during the real-time market or shortly afterwards – make the appropriate changes in the shared Google Sheet that participants continue to have access to.

### The Recap Email

You want your participants to have a permanent place where they can find the link to the master Google Sheet with all the offers and needs. You'll also probably have specific and maybe time sensitive calls to action for them to do now that the event is over.

The recap email template below is intended to be sent 1-5 days after the real-time market ends. Sooner is better, but take the time you need to create or update any documents you link to in the email.

#### Email Template

**Subject:** [Community name] Offers and Needs Market recap + spreadsheet (the matches continue!)

#### Body:

Hey wonderful [humans/name the community or group refers to themselves as (e.g., multipotentialites)] who gave offers and needs in our [date of event (e.g., "March 13")] Offers and Needs Market (OANM)!

I promised I'd give you the final spreadsheet with any updated offers and needs and it's right here [hyperlink the Google Sheet on the anchor text "it's right here"]]. As the connections and matches march on, I want to help you get even more from our experience.

First, I *strongly* encourage you to follow up on 1-3 offers or needs within the next week. It might be best to reach out about items you're most excited about, but action on anything is better than nothing.

As you review any offers or needs you didn't already get to, keep the following in mind to maximize your chance to get a match:

- Do keyword searches within the spreadsheet for things you said you need (e.g., accountability) or things other people need and you might offer (e.g., design).
- Sorting or filtering among the offers and needs is going to help a lot. [Use these instructions](#).

OANMs are not just community-building exercises; they're also trust-building activities. So please remember to keep the contents of our spreadsheet among people who actively participated (a.k.a. people you see in the spreadsheet) [[if relevant, mention others in the same group/community who didn't participate but can be trusted to keep the information private [(e.g., "or trusted fellow [name the community or group refers to themselves as (e.g., multipotentialites)"]]].

Thanks again for letting me share one of my favorite gifts – the gift of a fantastic OANM!

[Your preferred sign-off (e.g., All the best, Joel Zaslofsky)]

P.S. Your survey feedback was super helpful! I have a lot of changes to make for the next OANM thanks to you. :)

And if you didn't complete the quick [X] minute survey like so many others, you can still do it here [\[hyperlink to the survey on the "do it here" anchor text\]](#).

## Miscellaneous Tips

### Facilitator Pro Tips

1. If you want to use a different framework than the head/heart/hands/connection one to help people wrap their heads around what they might offer or request, OffersandNeeds.com has had good ones in the past, but they are no longer public domain.
2. You can offer to add new offers or needs that participants thought of during the real-time market. It can go something like this: "If you have new offers and needs you've just thought of today, you can send them to me via email at [\[your email address\]](#) in the offers and needs capture Google Sheet from the event description. As long as you get them to me within [\[X number of days\]](#), I'll add them to the final version of the master spreadsheet I send out to all participants."

## What Now?

Did you enjoy your OANM experience and want to have one happen for another community you belong to? Contact your facilitator for details or [send a note to Joel Zaslofsky](#) so he can provide you with the resources you'll need.

And if you want to go even deeper, consider and answer some modified questions from Peter Block's book, *Community: A Structure of Belonging*.

- What gift have you received from another in our OANM? (Get specific)
- What has someone in your community done today that has moved you or been valuable to you?
- How did someone in your community engage you in a way that had meaning?
- What gift do you have that nobody knows about?
- What are you grateful for that has gone unspoken?
- What is the positive feedback you receive that still surprises you?
- What is the gift you have that you don't fully acknowledge?

## Changelog

Version #	Date	Version Notes (e.g., what was added, modified, or deleted from the previous version)
1.0	2022-10-13	<p>I just started the changelog so I (and you) can track how the process changes over time. I'll begin with what's changed since I published the last version in March 2022.</p> <ul style="list-style-type: none"><li>• Add notes about limiting the time for breakout rooms so participants get more chances to match (e.g., avoid the possibility that two people will take 30+ minutes in a breakout room without coming back to the main room)</li><li>• Added information about how to run a preparation session. Special thanks to Sónia da Veiga for coming up with the process and refining it in the Puttyverse!</li></ul>
1.1	2025-04-05	<ul style="list-style-type: none"><li>• Made the verbal templates a whole lot shorter and more playful.</li><li>• Added some general tweaks from experiments I and other facilitators have run.</li></ul>

## Acknowledgments

I probably would have never heard about the OANM if it were not for my friend, Donnie Maclurcan. He continues to be my go-to OANM resource and much of what you see in this facilitator guide is a variation of resources he's put together on running OANMs.

I couldn't do it without ya, Donnie! And neither could many of the people using this guide. Thank you, **thank you!**

### Sharing, Modifying, or Copying This Guide

This guide is uncopyright, meaning you can copy, modify, and share it how you see fit – with or without attribution. Of course, hat tips are nice. :)