

"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 joyful, guided process where groups come together to discover and exchange their passions, knowledge, skills, resources, and needs.

The OANM unearths and shares the diverse forms of wealth we all have, and reminds us that so much of what we need for a good life is already within our grasp. Whether for free, barter, or a set rate, people offer and need things like tech help or some extra produce.

Participants have found work, housing, new friends, a richer self-identity, and even a renewed trust in their community. Each exchange builds a connection, more connections create meaningful relationships, and the collective relationships strengthen communities – and maybe even create new ones.



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](#) from OANMs that I (Joel Zaslofsky) have run at various events and gatherings.

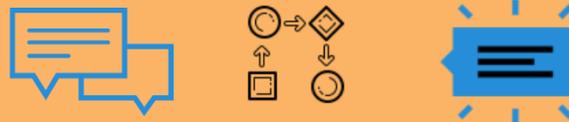
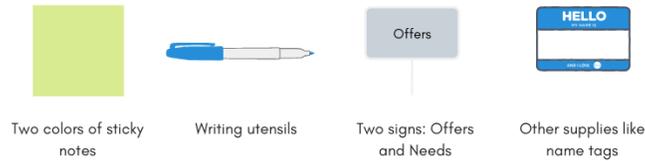
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The High-Level Process

Running the Offers and Needs Market

Get supplies and set up the environment



Share context, the high-level process, and some pro tips.



Create your offers

Create your needs

The market opens and matches begin



Post-market

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

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

(Click the image to view larger)

How an OANM Creates and Helps Communities

- **It builds and enhances** personal or group connections. Knowing who's doing what, who has access to what, and who knows who are vital for a sustainable sense of belonging.
- **It creates new possibilities** for co-created action that none of us can do alone.
- **It's just plain fun and useful.** Who couldn't use a new accountability buddy, creative pro, or ukulele player in their life? (All real examples, among thousands more.)
- **It allows for rapid feedback on creative, business, or other projects.** Having a few folks give you sincere, real-time input on your offers can be life-changing.
- **It reduces waste.** When someone else's surplus or gift can become another's resource, fewer precious commodities like time go to waste.
- **It increases community ownership and commitment** since it requires active participation and shifts the group narrative to what's abundant from what's scarce.
- **It builds confidence** to ask for what you truly need and own the gifts you're meant to share.
- **It's a simple, fast, and inexpensive way to resource a movement** because it focuses on what already exists – people's hidden or underused gifts.
- **It honors the best of gift, barter, and commercial exchanges.** Why settle for only one type of market when you can have three in one?

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 OANM facilitators can forget some of the key steps if they don't have a process to continually check items off their lists.

Prep and Prerequisites

<input type="checkbox"/> (1+ day ahead) Get the following supplies: stacks of sticky notes, writing utensils, a sign labeled "Offers" and another labeled "Needs," kraft paper (e.g., butcher paper), name tags if participants might not know everyone else, printed or digital copies of the participant instructions, a white board for announcements or housekeeping items, and a timer.
<input type="checkbox"/> (1+ day ahead) Secure a space that can alternate between quiet and interactive, has at least one large, flat surface (e.g., a wall) or multiple smaller, flat surfaces (e.g., tables) for sticky notes, movable and/or circular tables, and light chairs.
<input type="checkbox"/> (1+ day ahead) Promote your OANM however you see fit. One of your needs may be asking others to help you market the market. :)
<input type="checkbox"/> (1+ day ahead) Send reminders to people who have RSVPed or haven't responded to your invite yet.
<input type="checkbox"/> (30+ minutes ahead) Set up the space with stacks of sticky notes, pens/pencils, kraft paper on the walls if the sticky notes won't stick directly to the wall, a clear space around where the sticky notes will go, and visual examples of individual completed Offers and Needs notes.
<input type="checkbox"/> (5+ minutes ahead) Welcome participants as they come into the space and orient them on where to sit.

The OANM Process

<input type="checkbox"/> (3-5 minutes) Provide context for participants
<input type="checkbox"/> (3-5 minutes) Run through the housekeeping items
<input type="checkbox"/> (3 minutes) Explain the anatomy of a Offers sticky note
<input type="checkbox"/> (10 minutes) Create the Offers
<input type="checkbox"/> (2 minutes) Explain the anatomy of a Needs sticky note
<input type="checkbox"/> (10 minutes) Create the Needs
<input type="checkbox"/> (3-5 minutes) Allow each participant to verbally pitch <i>one</i> of their Offers and/or Needs
<input type="checkbox"/> (Remaining time available) Interact with participants, check out the Offers and Needs for yourself, suggest that participants can run their own OANM, and whatever else you enjoy
<input type="checkbox"/> (Last step) Digitally capture the sticky note information or physically take down the sticky notes and hand to the volunteers who will be doing the digital data entry

[The Short-Term Follow-Up](#)

<input type="checkbox"/> (0-2 days after) Email the data entry template to volunteers
<input type="checkbox"/> (0-2 days after) Add a reminder to follow up with data entry volunteers who don't send back the information by your deadline
<input type="checkbox"/> (2-14 days after) Edit the digital data
<input type="checkbox"/> (As soon as the digital data is edited) Share the digital data with your participants.

[The Long-Term Follow-Up](#)

<input type="checkbox"/> (30+ days) Send out the post-OANM participant survey
<input type="checkbox"/> (60+ days) Review the survey responses
<input type="checkbox"/> (60+ days) Share cool stories, stats, or testimonials with those who would appreciate it
<input type="checkbox"/> (60+ days) Make changes to your future OANMs based on the survey responses

The Prep and Prerequisites

There are [other great ways](#) to [facilitate an OANM](#) (you can even do a [decentralized version](#)). I typically practice a specific process with specific tools (Post-It Notes, spreadsheets, and quirky facilitation – oh my!).

Physical Supplies Needed

1. Two eye-pleasing colors (no neon please) of sticky notes (e.g., Post-it Notes) with up to 10 notes of each color per person.
2. Pens, pencils, thin markers, or something else for each person to write with. Black pens or dark, thin markers are generally the easiest to read on sticky notes of various colors.
3. [Kraft paper](#) (e.g., butcher paper) to place sticky notes on that otherwise won't stick well to your space's wall or allow you to roll up and take away the sticky notes in bunches (e.g., to bring back another day).
4. One sign labeled "Offers" and another labeled "Needs" for each person to place their sticky notes around.
5. Clear or light-colored tape (e.g., Scotch/magic, paper, masking/painter's, or spike) to secure signs or kraft paper.
6. Name tags if everyone doesn't know everyone else since they'll want to match a person with their name on a sticky note.
7. Printed or digital copies of the [participant instructions](#).

[Get the Participant Instructions](#)

Time and resources allowing, I recommend one set of printed instructions for every three participants (many will want to take theirs home or write on them). Digital instructions aren't as useful unless you project them on a large screen or have a good percentage of people who prefer things to be digital.

8. A timer to track ten minute segments for writing Offers and Needs without watching the clock.

The Ideal Environment

- A large space that can be quiet when people are silently writing and interactive when people are connecting about matches.
- A single large, flat surface like a wall or multiple smaller, flat surfaces like a table for sticky notes. If possible, test the surface ahead of time and limit any air currents that might blow the sticky note off the wall or table (e.g., from a nearby air vent or open window).
- Movable and/or circular tables for people to write on and chat around.
- Light chairs that participants can move themselves so you won't have to.

How to Find a Gathering Place

The simple act of hosting a OANM is amazing in itself, so don't overthink your gathering place. Communities grow and shrink, location demands change, and you only need to focus on the present.

Here are some guidelines to help you find and line up a great spot for your group:

1. **Light on distractions.** Avoid places with loud TVs, giant ads on walls, people moving around constantly, or anything else that might limit people's attention on you and their fellow participants.
2. **Free is generally best.** Money tends to complicate things. Rented venues can be great, but free is often better and simpler.
3. **As private as possible.** Private rooms, or at least areas free of the general public, promote greater sharing, more authenticity, and the power to mold your environment into one that captures the OANM spirit. If you plan to have 10+ people, some venues may waive their room rental fee or you might easily cover a food and drink minimum. Tell a potential venue why you're gathering and they may even buy into the vision enough to make special arrangements for you.
4. **Allows for a circular set-up.** I believe the difference between an audience and a community can come down to which way the chairs are facing.

Unique places are great, but here are some tried-and-true suggestions to get your brain juices flowing:

Free Location Ideas: Bookstores, cafes, coffee/tea shops (especially independently owned or operated ones), community centers or communal rooms in school buildings, grocery stores with indoor or outdoor seating areas, intentional community buildings/houses, public libraries, living room of someone's house/apartment, non-profit businesses, places of worship (e.g., churches, mosques, or temples) and retirement/ assisted living facilities.

Rented Location Ideas: Aquariums, art galleries, atriums, college/university rooms or student centers, conference centers, co-working spaces, gymnasiums, museums, restaurants, retreat or wellness centers, theaters (e.g., performing arts or movies), and warehouses.

Productive Google Searches: I recommend using a few Google searches (or your own variations) to more easily find a local gathering spot:

Free meeting location/place [insert your city, town, or region]

Community meeting rooms [insert your city, town, or region]

[insert your city, town, or region] best cheap/discount/bargain/budget event/venue space

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 in-person 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 technology or oldest old-school strategies. They can send emails, market on social media, engage people around town, and just generally be your OANM ambassador.

Welcomer/Registration Person. Who do you know that radiates warmth, is quick with a smile, and enjoys giving hugs, high-fives, and/or handshakes? Who has a knack for fun chats, will happily check people in, and will set a positive tone for everything that comes after a participant walks in the door? Put them front-and-center before (and maybe after) the gathering.

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”).

Supply Person. You already have a [list of supplies](#) to line up. How about supplemental paper, cables to hook up electronics, scissors, a guest book for participants, small signs to direct people to the gathering spot, and other physical supplies? It might help to find a supply person to bring everything that you need.

Space Setter-Upper. As you prepare to wear many hats, may want someone else to set up the room or environment for you. That might include moving chairs and tables into a circular formation, asking the venue staff to get a projector screen ready, putting up signs, etc. This same person can help restore the area to its original set-up if necessary.

Marketing Your OANM

Often, you'll need to have a concise description of what your OANM is, how it works, and how people benefit when they participate. Whatever you do, emphasize that OANMs work best when people learn about them in advance and come to the market with at least one offer and one need already thought out.

Here's a template below that you can tweak for length, style, and your unique needs.

OANM Event Description Template

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

Event Description:

The Offers and Needs Market (OANM) is a joyful, guided process where groups come together to discover and exchange their passions, knowledge, skills, resources, and needs. Whether for free, barter, or a set rate, people offer and need things like tech help, a place to live, or some extra produce.

The OANM unearths and shares the diverse forms of wealth we all have and reminds us that so much of what we need for a good life is already within our grasp.

Participants have found work, housing, new friends, a richer self-identity, and even a renewed trust in their community. Each exchange **builds a connection**, more connections create **meaningful relationships**, and the collective relationships **strengthen communities** – and maybe even create new ones.

It's also a way to practice Asset-Based Community Development as you focus on what resources (a.k.a. “assets”) the group already has. The OANM is 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.**

The OANM works best when participants learn about them and prepare some of their offers and needs in advance. So do yourself and others a favor: explore the process now: <https://joelzaslofsky.com/oanm-participant>

Are you looking for inspiration? Here's a spreadsheet with real examples of offers and needs from various events and gatherings: <http://bit.ly/OANM-Examples>

Bring a friend or two and find out what their gifts are as well, plus how you might help each other in new or surprising ways.

OANM Testimonial

If you feel like it'll help, you can use any testimonials you find on the [OANM landing 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, and community.
- 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)

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 take action (and often appreciate each one). So share your details or a link to RSVP two weeks out, two days out, and/or the day of your gathering. 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.

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](#).

Setting Up the Environment

1. Create stacks of up to 10 sticky notes of two different colors (one for Offers and one for Needs) and place them on chairs or tables for each person to take.
2. Set a writing utensil next to each stack of sticky notes.
3. Clear an approximately ten feet / three meters space (e.g., remove chairs and tables) around where the sticky notes will go so people have room to huddle around them.
4. (If necessary) Tape the kraft paper to the section of the room you want participants to place their sticky notes.
5. Display [visual examples](#) of completed Offers and Needs notes (physically or digitally with a projector).

Pro tip: Hand write at least one example of an Offer sticky note and one example of and Need sticky note. Then place them at *each* area that people will be writing at. It's the simplest and fastest way for someone to know they're writing their Offer or Need the way you want them to.

The OANM Process

Providing Context for Participants

Once your participants are settled in front of their sticky notes, it's time to set expectations and give them the context they need to get the most out of their experience. Here are some suggestions about what you might *concisely* say in 3-5 minutes:

- Introduce yourself in thirty seconds or less.
- Explain your history with OANMs and your experience in running them (for some social proof).
- Mention a surprising story/testimonial from one of your previous OANMs.
- Give a high-level overview of the process.
- Let participants know that, if they give themselves fully over to the process, they'll get some great side benefits. That might involve making a new friend, reducing the frequency or intensity of their Imposter Syndrome as they humbly own their gifts, get better at asking for help (which can be *really* hard for most folks!), etc.
- You're going to ask them to maintain silence for up to ten minutes at a time. Yes – it can be hard. But we can do it ... and your fellow OANM participants will be grateful when you do!

Housekeeping Notes

Provide a printed and/or verbal list of these housekeeping notes to make a better and more valuable experience for everyone:

- You only need to share what you're comfortable with.
- The OANM is both a community-building and trust-building exercise. Everything we do here assumes everyone has the best of intentions and that nobody's offering is available in unlimited quantities. In other words, *what we offer each other shouldn't be and won't be exploited*.
- Talk about the power of the informal economy and the importance of the commercial economy. You're giving people permission to be generous *and* to have a financial exchange if they see fit – which avoids guilt or shame for wanting to charge for an offer. There's wisdom in the gift economy, bartering, pay what you can, conventional commercial market, and other forms of exchange! Why limit ourselves to one when we can have the best of each?
- Go beyond what you think people might expect you to say are your gifts. The more specific the gift, the more likely it will be unique ... and potentially of even greater value to the group.
- The contents of each sticky note will be put in a spreadsheet and made available *exclusively* to only participants. In other words, writing down an offer or need comes with implicit permission for participants to contact you about it in-person or in the future. *Don't write it down if you don't want someone asking about it.*
- Write in your largest, most legible hand-writing. Even someone with poor eyesight should be able to read the contents of every note from at least six feet / two meters away.
- Prompt your participants: "If you *don't* have sticky notes and something to write with at hand, let me/us know and I'll/we'll get you what you need – maybe literally." ;)
- Ask for one volunteer per 100-150 sticky notes to put the contents of the sticky notes into a digital archive (e.g., spreadsheet) that participants can access at a later time.

- Tell participants – and continue to remind them – to place their sticky notes on the designated surface once they're done (or think they're done) to avoid everyone placing their notes in a cramped area all at once. Additional notes can be added later if they think of more offers or needs.
- If you have questions or need supplies during the quiet time when people are writing, non-verbally get a facilitator's attention and they'll come help you.
- Mention you'll be gently persistent in keeping the silence during writing time.

Overview: Completing Offers and Needs

1. To verbally say: "Everything I'm about to say is included in greater depth in the printed/digital instructions that you can find [in front of you, at a specific URL, etc]."
2. Explain the [anatomy of a Offers sticky note](#). Don't deviate from the provided examples or printed instructions unless you're ready for some confusion or questions.
3. Remind participants that the spirit of a OANM is non-commercial. Any negotiation about a potential financial exchange for an Offer or Need should be done after the market has concluded.
4. Give participants ten minutes to write down their Offers (remember to start your timer) and prompt them to start sticking their sticky notes to the designated surface once they're done to avoid everyone trying to do it at once.
5. About five minutes in, let everyone know they have about five minutes left and that they can start placing their sticky notes on the designated surface as soon as they feel done or need a mental break before they create more Offers.
6. Let everyone know their ten minutes are up and they can continue with more Offers as they come to mind.
7. Explain the [anatomy of a Needs sticky note](#). Don't deviate from the provided examples or printed instructions unless you're ready for some confusion or questions.
8. Remind everyone that we're about quality over quantity and to be silent while others are still writing.
9. Give participants ten minutes to write down their Needs (remember to start your timer) and prompt them to start sticking their sticky notes to the designated surface once they're done to avoid everyone trying to do it at once.
10. About five minutes in, let everyone know they have about five minutes left and that they start placing their sticky notes on the designated surface as soon as they feel done or need a mental break before they create more Needs.
11. Let everyone know their ten minutes are up and they can continue with more Offers or Needs as they come to mind.
12. If you don't already have a volunteer (or multiple if you have more than 100 notes) to put the contents of the sticky notes into a digital archive (e.g., spreadsheet), ask for one/some now.
13. Transition into [opening the market](#).

Creating Offers

We always begin with Offers because they're almost always easier for people to think of and symbolic that we've come together to be generous with our gifts (a.k.a. give first, receive second).

1. Take up to ten minutes to write up to ten offers for your fellow participants. These are typically things that come from your heart (caring about children or the environment), head (knowing about creative writing), hands (cooking or carpentry), or connections (the groups or associations you and your family belong to).
 - **Heart examples:** "I'm passionate about animal rescue centers and willing to volunteer to help animals in distress" or "I nerd out about spreadsheets and would enjoy helping you craft yours."
 - **Head examples:** "I know a lot about tiny houses and will chat with people who want to know more" or "I can show you how to create an efficient podcasting workflow."
 - **Hands examples:** "I know how to do major plumbing jobs and often help people in my city with their smaller plumbing tasks" or "I can teach you how to design your own logo."
 - **Connections examples:** "I can introduce you to people in the permaculture movement" or "I'll sponsor your membership in [insert desirable organization]."

Pro tip: Encourage participants to think as broadly as possible about what they might offer others – personal, professional, on behalf of an organization, or otherwise. From services (e.g., assisting with grocery shopping) to passions (e.g., tennis buddy) to knowledge (e.g., how to use Twitter) to physical resources (e.g., a used printer) to introductions or leads (e.g., connections with graphic designers) – just about anything is fair game.

2. Write these things on each Offer sticky note:

Required

- **Your full name** (in the upper left).
- **Contact information** (in the upper right). This tells participants how you prefer to be contacted about the note contents (e.g., email, Twitter handle, phone number, or Skype ID).
- **The offer itself** (in the center). Use abbreviations if you have to and keep the description short.
- **How often your offer can be used** (in the lower left). Give participants an idea of how many times an offer can be used. For example, "Three Times Total" or "Five Times per Week." If you want others to know how many times a limited quantity Offer has been redeemed, you can write "1 2 3" and have participants physically strikethrough a number when they take someone up on their offer (e.g., 4 ~~2~~ 3).
- **Method of exchange** (in the lower right). Use one of these five short-hand ways to indicate how or if you want an exchange for your offer: Free, Barter, Fixed Price (with your currency symbol, like \$ or €, and the specific amount), Hourly Rate (with your currency symbol, like \$ or €, and the specific hourly rate) or Negotiable.

Optional

- **Expiration date** (in the lower middle). If you'd like your offer to expire after a certain amount of time, put a specific date on the note. Leave blank if your offer is good indefinitely.

Creating Needs

1. Take up to ten minutes to write up to ten needs that your fellow participants might help you with. For example, what are you working on, seeking, or what kind of support do you require that someone else might be able to provide?
 - **Heart example:** "I need a coach who can help me understand which passion to pursue first between meditation, building a business, and knitting."
 - **Head example:** "I want to self-publish my first book, but I have no idea where to start."
 - **Hands examples:** "I'd like to make classy, hand-made thank you cards, but I don't have access to the right tools" or "I want to build a shed in my backyard."
 - **Connection example:** "I play guitar and want to meet a local drummer and cellist to form a band."
2. Write these things on each Need sticky note:

Required

- **Your full name** (in the upper left).
- **Contact information** (in the upper right). This tells participants how you prefer to be contacted about the note contents (e.g., email, Twitter handle, phone number, or Skype ID).
- **The need itself** (in the center). Use abbreviations if you have to and keep the description short.
- **Urgency** (in the lower left). Use short-hand to tell others if your need is urgent (U), semi-urgent (SU), or not urgent (NU). This designation might make the difference between someone helping you right away or never getting around to it.
- **Method of Exchange** (in the lower right). Leave blank to indicate the default gift (a.k.a. free) option. Write a currency sign (e.g., "\$" or "€") if you're willing to pay to have your need met. *Note:* Each person is responsible for their own negotiation if it occurs.

Optional

- **Expiration date** (in the lower middle). If your need becomes irrelevant or obsolete after a specific date, write it down. Leave blank if your need will be outstanding indefinitely.

The Market Opens: Matching Offers with Needs

1. (Optional) Allow each participant to verbally pitch *one* of their Offers and/or Needs in fifteen seconds or less, starting with their full name. The time limit *will* be enforced. Microphones are good if you have a private and/or big space. Example: "I'm Joel Zaslofsky and I'd like to offer teaching you how to use spreadsheets in simple, minimalist ways."

Pro tip: 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.

2. If participants haven't put all their sticky notes on the designated surface, prompt them to do that.
3. Remind people not to physically take a sticky note they're interested in. Just take a picture with their phone or otherwise make a note of the note.
4. Encourage participants to approach each other about any verbal offer or need they heard (if done) and start browsing the Offers and Needs notes placed on the designated surface. Conversations will organically happen and you can even connect people in real-time when you identify a potential match.
5. Announce that every participant who put their email address on a sticky note will be getting the contents of all the sticky notes in a spreadsheet later on. If someone *didn't* put their email address on a Offers or Needs sticky note and wants to get everything in a spreadsheet, they should give a facilitator their contact information.
6. Have your volunteers [capture the contents](#) of the sticky notes and set expectations about their responsibility to keep the info safe and get it back to you by **[your deadline]**.
7. Honor your key helpers and/or co-facilitators. Mention their names, roles, and anything unique they contributed to make the OANM special.

The Short-Term Follow-Up

Depending on variables like your number of participants, how long they have to browse or discuss the sticky notes, and whether they actually see all the notes or not, there are many matches that can be made after the OANM by the facilitator or the participants.

I *highly* recommend you capture the information in the sticky notes and distribute them to the participants soon after the gathering so you all can extend the connection and matches. There are plenty of ways to do this, but I prefer getting volunteers to do it.

Finding Volunteers and Giving Them What They Need

1. Get a volunteer (or multiple volunteers if you have more than 100 notes) to capture all the information on the completed notes. You can use a digital tool like the [Post-it App](#), [Evernote Post-it Note camera](#), the [Microsoft OneNote app](#), or just grab them and physically take them home.
2. Provide your volunteer(s) with [a spreadsheet template](#) to enter the sticky note information. [Here's an email template to use when contacting them](#).
3. Have your volunteer(s) put the contents in a spreadsheet with the following columns so people can easily sort, filter, or search for a variety of relevant items:
 - Offer or Need
 - Category (e.g., Teaching, Financial, or Volunteering)

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, Habits, Health, Information, Making, Marketing, Personal Finance, Physical, Productivity, Relationships, Research, Resources, Sharing, Skills, Teaching, Technology, Travel, Volunteering, Writing, Other, N/A (Not Applicable).

- Subcategory (e.g., Graphic Design, Audio Recording, Mindfulness)

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).

- Offer or Need Description (which contains the full or edited text of each note)
- First Name (of person from the note)
- Last Name (of person from the note)
- Physical Location (If Relevant)
- Expiration Date
- Preferred Contact Method for This Specific Offer or Need (e.g., Email, Twitter, or Phone)
- Contact Details for This Specific Offer or Need (e.g., joel@simplerev.com)
- Offers Only: How Often Can People Contact You about Your Offer?
- Offers Only: Method of Exchange
- Needs Only: Urgency

- Needs Only: Are You Willing to Pay to Meet Your Need?

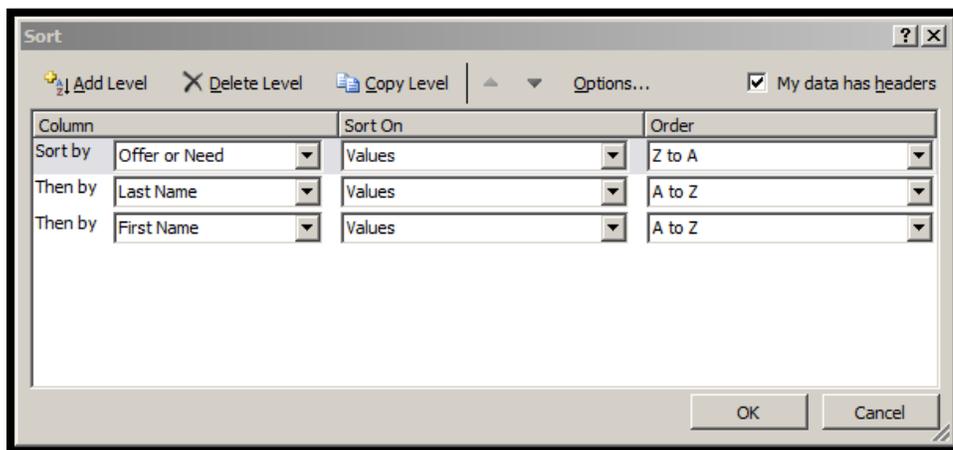
Edit the Digital OANM Content

Once your volunteers have given you back the contents of the sticky notes in your preferred digital format, it's time to edit what they've done. **Don't skip this step!** The value to participants is directly tied to how well you edit the digital data.

1. 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, too. Sorting and filtering for the win!
2. 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".
3. Edit offers or needs descriptions that are too long, imprecise, or confusing.

Pro tip: As you edit the spreadsheet for content and formatting, feel free to contact someone to suggest a match that might not have been made during the real-time market. [Here's a template for that.](#)

4. Remove extra spaces or correct poor formatting in the various spreadsheet columns.
5. 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 solid data integrity will help them do that well.
6. Run spell check on the spreadsheet.
7. Sort the spreadsheet by Offer or Need column first, Last Name second, and First Name third.



8. Distribute the completed spreadsheet however you see fit ([email example](#)) and remind people that the contents are intended only for people who actively participated in the OANM. I recommend sharing the spreadsheet in read only format (e.g., an uneditable Google Sheet) so people don't mess with each other's offers and needs or unintentionally mess up your formatting.

9. (Optional) Here's how to best [sort](#) and [filter](#) columns in Excel or [sort and filter](#) columns in a Google doc spreadsheet if your participants are going to use one of those tools to explore the captured information.

Email Templates

Email Template for Providing Data Entry Spreadsheet to Volunteers

Subject: Spreadsheet template for [Community name] Offers and Needs Market sticky notes

Body:

Hi [volunteer(s) first name(s)],

Thanks again for offering to put all our [Community name] OANM Post-it Notes into a spreadsheet to send out to other participants. [Here's the spreadsheet template](#), and feel free to ask questions if the column names aren't self-explanatory.

I'm not expecting you to categorize and subcategorize – I'll do that later if we have enough offers and needs to justify it. You just need to briefly review the format in the examples at the top and then do your awesome data entry thing until you get that gratifying "Check! Done." feeling.

It would be great to have a filled-out spreadsheet template back by [insert your reasonable deadline here]. Just don't go rearranging your life for this task. :)

Some grateful folks will have you to thank for many post-market connections and matches, so I hope you feel good about the impact you continue to make in our nifty community.

You're awesome!

[Your sign-off (e.g., Your friend, Joel)]

Email Templates for Suggesting a Potential Match to a Specific Participant

Example 1 (if you have email addresses or the ability to send a group direct message):

Subject: [Community name] Offers and Needs Market connections: [topic or theme of the match (e.g., video production/documentaries, SEO, book recommendations)]

Body:

[Person 1 first name],

I was going through the [community name] Offers and Needs Market information and [Person 2 first name] had an offer of [copy and pasted offer (e.g., "Video production and video editing")]. [Additional context if helpful (e.g., "Perhaps more importantly, [Person 2 first name] filmed and produced their own documentary.

[Person 2 first name],

[Person 1 first name] listed a need of [copy and paste need (e.g., "Guidance or ideas for producing a documentary about building our 'right-sized' small family house")].

It seems like you two may have a match on your hands, so take it from here if there's anything to discuss!

Happy connecting,

[Your sign-off (e.g., Your friend, Joel)]

Example 2 (more informal, concise, and one-to-one):

Subject: Potential [Community name] Offers and Needs Market match

Body:

Hi [Person 1 first name],

I'm editing our [Community name] Offers and Needs Market spreadsheet and I see a potential match here. Pardon the brevity – I'm prioritizing getting these emails out quick. :)

Your need: [copy and paste the need from the spreadsheet (e.g., "Guidance or ideas for producing a documentary about building our 'right-sized' small family house")]

[Person's name giving the offer (e.g., Joel Zaslofsky)] offer: [copy and paste the offer from the spreadsheet (e.g., "Help creating a documentary")]

You can contact [person's first name giving the offer (e.g., Joel)] at [whatever their preferred contact method is (e.g., joel@joelzaslofsky.com or +1 555-555-5555)].

[Your sign-off (e.g., Your friend, Joel)]

Email Template for Sharing the Digital OANM Info with All Participants

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

Body:

Hi awesome [Community name] people!

I'm grateful for the generosity, warmth, ideas, hugs (physical and virtual), and conversations in our [Community name] Offers and Needs Market. As the connections and matches march on, I want to help you get even more from our experience.

With *major* thanks to [first or full names of people who volunteered to put the sticky notes content in your spreadsheet template (e.g., Bennett, Steven, Shari, and Brad)], we have all your Post It Notes lovingly put into this Excel spreadsheet [hyperlink to the spreadsheet on "lovingly put into this Excel spreadsheet" text]. I saw some potential matches as I was consolidating all the info [something quirky or popular (e.g., "(soup recipes or accountability, anyone?")]

and I'll leave it up to you to know whether a match has already been made or should be made.

Pro tips to Use the Spreadsheet

Your sticky note data entry helpers and I wouldn't have taken so many hours of time to put everything in a spreadsheet [[hyperlink to the spreadsheet on "put everything in a spreadsheet" text](#)] and *not* have you use it. So, keep these tips in mind as you look for more matches:

- 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).
- You may not have access to Microsoft Excel or care for it as much as me. So you can also view the Excel .xlsx format of the spreadsheet in Google Drive ([instructions here](#)), with a program like [WPS Office](#) (my preference for Android and iOS), or other alternatives like LibreOffice or Apache OpenOffice.
- Sorting or filtering among the hundreds of offers and needs – preferably by category or subcategory where available – is going to help a lot. If you're using Excel, here's how to [sort](#) and [filter](#). If you're using a Google Sheets version, [use these instructions](#).

What Now?

Offers and Needs Markets (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 in-person (a.k.a. people you see in the spreadsheet) or trusted fellow [[name of people in the community \(e.g., church goers, WDSers, or puttypeep\)](#)].

Thanks again for letting me share one of my favorite gifts – the gift of a fantastic OANM! I'm grateful to be living a life of [[themes of the group you ran the OANM with \(e.g., "community, adventure, and service"\)](#)] with you.

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

The Long-Term Follow-Up

Crafting a Survey

Perhaps *the* major objection from people skeptical of OANMs is if participants actually get their offers or needs matched. Sure, you may see or hear about matches during the market itself or shortly thereafter. But did participants *really* follow through on their commitments to help and be helped?

The easiest way to find out is to send a survey at least thirty days after the market ended. That gives people enough time to go back and forth about fulfilling needs and see who was/is serious about making good on their offers. You can even wait up to six months to send a survey so interaction about offers and needs has time to develop – although the tradeoff is in how fresh the real-time experience is in participants' minds.

A side benefit is that you often get direct, invaluable feedback about how you did as a facilitator and great testimonials to use for future OANMs.

[Go here for a Google Form survey template you can copy and edit as you see fit.](#)

Important: Make sure you create a personal, separate copy of the template *first* before you make any edits.

Sending the Survey

Feel free to use this template:

Email Template for the Post-OANM Survey

Subject: A short Offers and Needs Market survey to make it (and us) more awesome

Body:

Hi wonderful [name of people in the community (e.g., church goers, WDSers, or puttypeep)] who participated in the Offers and Needs Market (OANM) that I facilitated!

I want to make sure you don't have a too long, didn't read experience with this email. So here's my humble request:

Please take just 5 minutes to shape the direction and focus of future OANMs with this quick survey. [hyperlink to the survey on the whole line of text that precedes this]

I need to make some intentional design changes and don't want to move forward without your guidance. For example, I'd like to know the kind of new relationships you created, how many offers or needs were actually exchanged, and what must be done differently for you to maximize a future OANM experience.

If you want to do something amazing for Future You and hundreds of future OANM participants, accept your invite to share your experiences in my brief survey [hyperlink to the survey on the "accept your invite to share your experiences in our brief survey" text].

Thanks in advance for your insight!

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

Reviewing the Survey

What good is a survey if you forget to review it and use it to change your future processes? Add a reminder to your calendar to review the results sometime after you can reasonably believe everyone who will fill it out has filled it out.

Pro tip: Ask people who praised the process, results, or your facilitation if you can use a version of their response as a public testimonial.

Visual Examples of an OANM



<p>Joel Zaslofsky jezaslof@gmail</p> <p>Show you how to authentically connect with people in-person.</p> <p>M Doesn't Expire</p>	<p>Joel Zaslofsky jezaslof@gmail</p> <p>Teach you how to podcast (complete with a ridiculous workflow document).</p> <p>M Doesn't Expire</p>	<p>Joel Zaslofsky jezaslof@gmail</p> <p>Give you one heck of a good, big hug!</p> <p>Any Doesn't Expire</p>
<p>Joel Zaslofsky jezaslof@gmail</p> <p>Someone to do one-off graphic design or document layout tasks.</p> <p>Any \$ SU</p>	<p>Joel Zaslofsky jezaslof@gmail</p> <p>Advise me on how to use the Elegant Themes Divi 2.4 WordPress Theme for a new website.</p> <p>W 09/15/2015 SU</p>	<p>Joel Zaslofsky jezaslof@gmail</p> <p>Teach me how to fall asleep fast.</p> <p>Any NU</p>

Acknowledgments

I probably would have never heard about the OANM if it were not for a conversation with 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!**

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