**Purchasing Priorities and Planning (P3) Tool TM**

***Every purchase proclaims your priorities.***

The goal of the P3 Tool is to help you gain insight into your purchasing priorities, compare 5 product or service purchases to your priorities, and, if needed, plan changes.

The Process:

1. Table 1, write the ethical business practices that are important to you. The practices may be in the areas of ownership and management structure, location, and other business practices. Then list the lifestyle considerations that impact your purchasing.
2. Table 2, list 5 product or service purchases and some information about each purchase.
3. Table 3, plan to purchase from equity-focused vendors.

| **Table 1** | | |
| --- | --- | --- |
| 1. **List the business structures or practices that are important to you.** | | |
| The list below represents some ownership and management structures important to many. It does not include all structures. | | |
| * Asian Owned * Black Owned * Consumer Owned Cooperative * Disabled Owned * Employee Owned | * Immigrant or Refugee Owned * Latinx Owned * LGBTQ+ Owned * Minority Owned * Native American Owned | * Owned by Religious Minority * Small Business * Veteran Owned * Worker Owned Cooperative * Women Owned |
| The list below represents some locations important to many. It does not include all locations. | | |
| * Close to where I live, work, learn, or play * My city or county * My region of the state | * Number of children in a neighborhood or census tract living in poverty * Number of households in a neighborhood or census tract living in poverty | * Priority area for an organization where I live, work, learn, or play |
| The list below represents some practices important to many. It does not include all practices. | | |
| * Active in the community * Animal cruelty-free * Carbon Neutral * Green Certified * CEO-to-Worker Pay Gap Limits | * Mission focus * Organic / Non-toxic * Observable diversity, inclusion & equity * Pays living wages | * Profit sharing plan * Public Benefit Corporation * Renewable Energy Powered * Union workforce * Zero Waste |
| 1. **List the lifestyle considerations that impact my purchasing decisions.** | | |
| Some lifestyle consideration and questions are below. It does not include all considerations that may influence your purchasing decisions. | | |
| * ***Price*:** How does the price of the equity-focused product or service compare to the price I usually pay for the product or service? * ***Convenience*:** Does the product or service need to be available as part of my routine lifestyle practices, for example, it must be a store that I routinely visit or buy from online? * ***Time:*** Am I willing to devote additional time to find and travel to a business to purchase an inclusive product or service? * ***Knowledge****:* Do I know how to find businesses that align with my purchasing priorities? * ***Recommendation/Reputation:*** What do I know about the business from other people or websites? * ***Familiarity with Business:*** How pleased with the product/service have I been when I purchased from this equity-focused business in the past? * ***Familiarity with Location:*** Am I familiar with the location of an equity-focused business if I need to go there to make a purchase? Do I feel safe working with this vendor if they will be coming to my home, school, or business? If I don’t feel safe, why? | | |

**Table 2**

**Purchase Analysis and Planning Directions**

1. In Table 1, you identified your purchasing priorities.
2. On Table 2, list actual purchases and identify the priorities that drove your purchasing decision.
   1. If you have inclusive purchasing priorities and they drove your actual purchases great!
   2. If not, label that purchase as Movable Spend to an equity-focused vendor. Moveable means you could have bought it somewhere else to better align with the spending choices you would like to make. Note: If you attempted to find a vendor but were not able to, do not label it as Movable Spend.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Table 2 - Purchase Analysis Example** | | | | | | |
| **#** | **Product or Service** | **Vendor** | **Date of Purchase** | **Cost** | **Purchasing Decision vs Personal Importance Comments** | **Movable**  **Spend** |
| 1 | House painting | ABC Painter | 6/1/21 | $500 | Got 3 quotes from vendors. Didn’t take time to search for an equity-focused vendor. Took lower price of the 3 quotes. | Yes |
| 2 | Coffee | XYZ Store | 6/2/21 | $25 | Worker-owned cooperative, sustainable, pays a livable wage |  |
| Total Cost | | | | $525 | Total Items | 2 |
| Total Movable Spend | | | | $500 | Total Movable Items | 1 |
| Movable Spend Percent | | | | 95% | Movable Item Percent | 50% |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Table 2 - My Purchase Analysis** | | | | | | |
| **#** | **Product or Service** | **Vendor** | **Date of Purchase** | **Cost** | **Purchasing Decision vs Personal Importance Comments** | **Movable**  **Spend** |
| 1 |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |
| 4 |  |  |  |  |  |  |
| 5 |  |  |  |  |  |  |
| Total Cost | | | | $0 | Total Items | 0 |
| Total Movable Spend | | | | $0 | Total Movable Items | 0 |
| Movable Spend Percent | | | | 0% | Movable Item Percent | 0% |

**Table 3**

**Purchase Planning Actions**

* Review the information on Table 2. Decide if equity purchasing is important to you. If yes and you have Movable Spend, record actions you will take in the next 30 days to move spend to equity-focused vendors.
* You may want to set an Equity Spend Dollars or Item Percent Goal.

Ideas suggested by others include:

1. Find websites, directories, associations, etc. that identify equity-focused vendors. Sources might include independent business associations, chambers of commerce, local and state government agencies.
2. Decide if you are willing to:
   1. Spend more time researching vendors
   2. Pay more for a product or services
   3. Wait longer for the product to arrive or the service to be delivered
   4. Drive longer and/or to an unfamiliar location

|  |  |
| --- | --- |
| **Table 3**  **Purchase Planning** | |
| 1 |  |
| 2 |  |
| 3 |  |