

SFA NAME:

## School Year (SY) 2016-17 Paid Lunch Equity (PLE) Tool Instructions

Note: Users may want to print the instructions and use them to guide users through the PLE Tool.

The PLE Tool was created to help School Food Authorities (SFAs) calculate their paid lunch price increase requirement and/or non-Federal source contributions to meet the requirements in Section 205 of the Healthy, Hunger-Free Kids Act of 2010. If the pricing requirements calculated by the PLE Tool are not met or are exceeded, the PLE Tool will also calculate any amounts, including credits or deficits carried over into the next year. Note, the weighted average prices calculated in the PLE Tool are the weighted average of all student paid lunch prices charged in the SFA.

### TIPS:

- 1) Have last year's PLE Tool available for reference
- 2) Were credits carried over from last year?
- 3) Is the current weighted average paid lunch price above the requirement?
- 4) Only the tab(s) relevant to the SFA's selection of method to meet PLE requirements need to be completed
- 5) The \$.10 cap does not mean that every SFA will raise the weighted average paid lunch price or contribute the equivalent in non-Federal funds. Depending on where the SFA is at in regards to meeting the PLE requirement, they may need to contribute less than \$.10 or may choose to contribute more than \$.10.

For more information on amounts carried over please refer to SP 39-2011

*This version of the PLE Tool is only applicable to SY 2016-2017. A new version of the PLE Tool will be issued for SY 2017-2018*

### The SY 2016-17 PLE Tool consists of 8 tabs:

Hyperlinks are also placed throughout the tool to navigate to the different tabs. Only the tabs for the method selected to meet the PLE requirement have to be filled out.

- Tab 1: Instructions  
Tab 2: [Annual Unrounded Requirement Finder](#)  
Tab 3: [SY 2016-17 Price Calculator](#)  
Tab 4: [SY 2016-17 Non-Federal Calculator](#)  
Tab 5: [SY 2016-17 Split Calculator](#)  
Tab 6: [SY 2016-17 REPORT](#)  
Tab 7: [SY 15-16 Price Calculator](#)  
Tab 8: [SY 10-11 Price Calculator](#)

\* The tabs (SY 15-16 and SY 10-11 Price Calculators) are for use as needed

Cells shaded this color designate data entry cells. The SFA must enter the applicable data in these cells for the tool to calculate the requirements

**Only complete the tabs for the method used for meeting the requirement (raising prices, contributing non-Federal sources, or the split calculator).**

### SFAs need the following data to calculate the Weighted Average Price for SY 2016-17:

- 1.) SY 2015-16 Weighted Average Price
- 2.) SY 2010-11 Weighted Average Price, if the SY 2015-16 Weighted Average Price is unknown
- 3.) All student paid lunch prices for October 2015

4.) Number of paid lunches served associated with each student paid lunch price in October 2015

**SFAs who have opted to contribute non-Federal sources for SY 2016-17 need:**

- 1.) SY 2010-11 Weighted Average Price, as needed
- 2.) SY 2015-16 Weighted Average Price (if different from SY 2010-11 Weighted Average Price)
- 2.) Total number of student paid lunches served in SY 2015-16
- 3.) The total dollar amount through SY 2015-16 non-Federal contribution

**SY 2016-17 WEIGHTED AVERAGE PAID LUNCH PRICE CALCULATION**

*These instructions are for SFAs increasing their weighted average prices to meet the SY 2016-17 paid lunch price requirement*

**Step 1**

Tab 2: [Annual Unrounded Requirement Finder](#)

1. Enter SY 2015-16 unrounded price requirement in the orange box.

*If the SY 2015-16 unrounded price requirement is not known then use the annual unrounded requirement*

*This figure sets the pricing requirements throughout the Tool and helps determine any amounts carried forward. This figure was calculated through the SY 2015-16 PLE Tool.*

*After calculating the SY 2016-17 weighted average price requirement for student paid lunches, click on the link labeled " **Click here to go to SY 2016-17 Price Calculator** "*

**Step 2**

Tab 3: [SY 2016-17 Price Adjustment Calculator](#)

*The box at the top of this tab displays the SY2016-17 Weighted Average Price Requirement*

To calculate the SY 2015-16 Weighted Average Price the SFA must:

1. Enter the student paid lunch count for October 2015 associated with each paid meal price in the **Monthly # of Paid Lunches** column.
2. Enter each student paid lunch price in the SFA (including all schools – elementary, middle, high, etc) for October 2015 in the **Paid Lunch Price** column.

*Using the SY2015-16 weighted average price, the tool calculates any amounts necessary to meet the SY2016-17 weighted average price requirements and any amounts carried forward to SY2017-18.*

Tab 6: [SY2016-2017 REPORT](#)

This report is generated for use in the SY2017-18 PLE tool and displays the SY2016-2017 requirements and any amount carried forward determined on the SY2016-2017 Price Calculator

Select the SY 2016-2017 method used to ensure sufficient funds are provided for PAID lunches

**<OPTIONAL> Step 3**

**Pricing Estimation Calculator**

Once an SFA has calculated the SY 2016-17 average student paid lunch price requirement, they can use the PLE tool to determine how they want to distribute the price increase within the SFA to reach the new average paid lunch price. To do this an SFA must:

1. Enter the student paid lunch count for October 2015 associated with each student paid meal price in the **Monthly # of Paid Lunches** column.
2. Change individual student paid lunch prices until the average student paid lunch price reaches the new average student paid lunch price requirement. This amount will appear in the **Weighted Average Price** box.

Many price combinations can be used to reach the new weighted average student paid lunch price. SFAs have the flexibility to raise individual student prices as long as the weighted average student price equals the new SY2016-2017 required level.

[Go to SY 2016-17 Price Calculator](#)

## SY 2016-17 NON-FEDERAL SOURCE CONTRIBUTION CALCULATION

### Step 1

Tab 2: [Annual Unrounded Requirement Finder](#)

1. Enter SY 2015-16 unrounded price requirement in the orange box.

*If the SY 2015-16 unrounded price requirement is not known then use the annual unrounded requirement*

This figure sets the pricing requirements throughout the PLE Tool and helps determine any amounts carried forward. This figure was calculated through the SY 2015-16 PLE Tool.

After calculating the SY 2016-17 weighted average price requirement for paid lunches, go to SY 2016-17 Non-Federal Source Calculator tab

### Step 2

Tab 4: [SY 2016-17 NonFederal Calculator](#)

*The box at the top of this tab displays the SY2016-17 Weighted Average Price Requirement*

#### SY 2016-17 Non-Federal Source Contribution Requirement

1). Enter the current weighted average student paid lunch price.

*This price may be the same as the SY 2015-2016 weighted average price determined on the Unrounded Requirement Finder tab if the SFA did not raise the weighted average price in SY 2015-2016. To determine the most current average weighted price go to the SY2015-2016 Price Calculator tab.*

2.) Enter the student paid lunch count for the entire 2014-2015 School Year in the orange **Annual # of Paid Lunches** box in the Non-Federal Source Contribution Calculator for SY 2016-17.

*The Tool will calculate the annual non-Federal source contribution for SY 2016-17 with and will apply the 10 cent cap if applicable*

2.) Enter the amount of **Non-Federal Source Funds Contributed for SY 2011-12 through SY 2015-16** in the orange box labeled as such.

Based on the actual amount contributed for SY 2015-16, the tool calculates the following:

- Remaining Annual Non-Federal Source Contribution for SY 2016-17
- Remaining Annual Non-Federal Source Contribution carried forward to SY 2017-18
- Remaining Credit carried forward to SY 2017-18

Tab 6: [SY2016-2017 REPORT](#)

This report is generated for use in the SY2017-18 PLE tool and displays the SY2016-2017 requirements and any amount carried forward determined on the SY2016-2017 Price Calculator

Select the SY 2016-2017 method used to ensure sufficient funds are provided for PAID lunches

## SY 2016-17 Split Calculator

*This tab is for those SFAs wishing to split their requirement by both raising prices and contributing a non-Federal source*

### Step 1

Tab 2: [Annual Unrounded Requirement Finder](#)

1. Enter SY 2015-16 unrounded price requirement in the orange box.

*If the SY 2015-16 unrounded price requirement is not known then use the annual unrounded requirement*

*After calculating the SY 2016-17 weighted average price requirement for paid lunches, click on the link labeled " **Click here to go to SY 2016-17 Split Calculator** "*

### Step 2

Tab 5: [SY 2016-17 Split Calculator](#)

*The box at the top of this tab displays the SY2016-17 Weighted Average Price Requirement*

To calculate the SY 2015-16 Weighted Average Price the SFA must:

1. Enter the student paid lunch count for October 2015 associated with each student paid meal price in the **Monthly # of Paid Lunches** column.
2. Enter each student paid lunch price in the SFA (including all schools – elementary, middle, high, etc) for October 2015 in the **Paid Lunch Price** column.

*Using the SY2015-16 weighted average price, the tool calculates any amounts necessary to meet the SY2016-17 weighted average price requirements and any amounts carried forward to SY2017-18.*

### Step 3

1. Enter the weighted average price they plan to charge for student paid lunches in SY 2016-17 in the

### Step 4

To calculate the remaining amount of non-Federal sources contributions needed, the SFA must:

- 1.) Enter the student paid lunch count for the entire 2014-2015 School Year in the orange **Annual # of Paid Lunches** box in the Non-Federal Source Contribution Calculator for SY 2016-17.
- 2.) Enter the actual amount of the non-Federal source contribution in the orange box labeled **Amount of Non-Federal Source Funds Contributed from SY 2011-12 through SY 2015-16.**

Based on the actual amount contributed for SY 2015-16, the tool calculates the following:

- Remaining Annual Non-Federal Source Contribution for SY 2016-17
- Remaining Annual Non-Federal Source Contribution carried forward to SY 2017-18
- Remaining Credit carried forward to SY 2017-18

Tab 6: [SY2016-2017 REPORT](#)

This report is generated for use in the SY2017-18 PLE tool and displays the SY2016-2017 requirements and any amount carried forward determined on the SY2016-2017 Price Calculator

Select the SY 2016-2017 method used to ensure sufficient funds are provided for PAID lunches

***SFAs may use optional tabs 7 and 8 if they need to make calculations from previous years .***

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## Step 1

<b>Enter the SY 2015-16 Unrounded Price Requirement in the box below</b>	<b>SY 2016-17 Weighted Average Price Requirement</b>
<i>This is can be found in Section 1: Box A of the SY 2015-2016</i>	<b>Requirement price to the nearest cent</b>
\$ 2.70	\$ 2.78
<i>Note: Above prices are based on adjusting SY 2015-2016 price requirement by the 2% rate increase plus the Consumer Price Index (2.97%)</i>	

## Complete if you do NOT know your SY 2015-2016 Unrounded Price Requirement

### **Annual Unrounded Requirement Finder**

Enter the SY 2010-11 Weighted Average Price below

**\*\* The weighted average price for SY 2010-11 is the weighted average of all paid**

SY 2010-11 Weighted Average Price	Unrounded Price Requirements	
	Price 1: SY 2014-2015 Requirement price to the nearest cent	Price 2: SY 2015-2016 Requirement price to the nearest cent
\$ 2.42	\$ 2.65	\$ 2.70

**If you do not know your SY2010-2011 Weighted Average Price**  
[CLICK HERE](#)

*Note: The SY 2015-16 requirement is based on price increase requirements from SY 2011-12 through SY 2014-15.*

**Use the links below to go to the next step:**

[Click here to go to SY 2016-17 Price Calculator](#)

[Click here to go to SY 2016-17 Non-Federal Source Calculator](#)

[Click here to go to SY 2016-17 Split Calculator](#)

[Go to Instructions](#)

Note: This tool is created to allow the user to only enter the weighted average price. If any other parts of the tool are modified, the user runs the risk of calculating an incorrect new average price. Users should not modify the tool's current functionality.

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## SY 2016-17 Price Adjustment Calculator

[Go to Instructions](#)

SY 2016-17 Weighted Average Price Requirement	
Requirement price to the nearest cent	Optional price requirement ROUNDED DOWN to nearest 5 cent
\$ 2.78	\$ 2.75
Note: Above prices are based on adjusting SY 2015-2016 price requirement by the 2% rate increase plus the Consumer Price Index (2.97%)	

## SY 2015-16 Weighted Average Price Calculator

Enter the paid prices and number of paid lunches sold at each price for  
October 2015.

	Monthly # of Paid Lunches	Paid Lunch Price	Monthly Revenue	SY 2015-16 Weighted Average Price
1.	1,931	\$ 2.55	\$ 4,924.05	
2.	2,128	\$ 2.80	\$ 5,958.40	
3.			\$ -	
4.			\$ -	
5.			\$ -	
6.			\$ -	
7.			\$ -	
8.			\$ -	
9.			\$ -	
10.			\$ -	
<b>TOTAL</b>	<b>4,059</b>		<b>\$ 10,882.45</b>	<b>\$ 2.68</b>
Note: SY 2015-16 Weighted Average Price equal to or above \$2.78 are compliant for SY 2016-17. \$2.78 is the difference between the Free and Paid reimbursement rates for SY 2015-16.				

Total Price Increase  
for SY 2016-17

\$ 0.07

Required price increase for SY 2016-17 (with  
10 cent cap)

\$ 2.75

Remaining increase carried forward  
to SY 2017-18

\$ -

Remaining credit carried forward  
to SY 2017-18

\$ -

[Go to SY2016-2017 Report](#)

## Step 3 (Optional)

## Pricing Estimation Calculator

Below is a tool allowing users to manipulate prices to achieve the required new weighted average price.

	Monthly # of Paid Lunches	Paid Lunch Price	Monthly Revenue	Weighted Average Price
1.	1,931	\$ 2.65	\$ 5,117.15	
2.	2,128	\$ 2.90	\$ 6,171.20	
3.			\$ -	
4.			\$ -	
5.			\$ -	
6.			\$ -	
7.			\$ -	
8.			\$ -	
9.			\$ -	
10.			\$ -	
<b>TOTAL</b>	<b>4,059</b>		<b>\$ 11,288.35</b>	<b>\$ 2.78</b>

Note: This tool is created to allow the user to only enter the number of paid lunches and the related prices. If any other parts of the tool are modified, the user runs the risk of calculating an incorrect new average price. Users should not modify the tool's current functionality. November 2015

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## SY 2016-17 Non-Federal Contribution Calculator

[Go to Instructions](#)

SY 2016-17 Weighted Average Price Requirement	
Requirement price to the nearest cent	<i>Optional</i> price <b>ROUNDED DOWN</b> to nearest 5 cent
\$ 2.78	\$ 2.75
<i>Note: Above prices are based on adjusting SY 2015-2016 price requirement by the 2% rate increase plus the Consumer Price Index (2.97%)</i>	

Current Weighted Average Paid Price	
Enter in the current weighted average paid lunch price. <i>Note: If SFA did not change the weighted average paid lunch price in SY2011-2012, SY2012-2013, SY2013-14, SY 2014-15, or SY 2015-16 enter the SY2010-11 weighted average price. Otherwise, click the link below.</i>	
	<a href="#">Click here to determine SY2015-2016 weighted average price</a>

Non-Federal Source Contribution Calculator for SY 2016-17		
Enter the total paid lunch count (for all prices). <i>** Annual Non-Federal Source funds for SY2016-2017 are estimated based on the ACTUAL lunch count entered below</i>		
Enter annual # of Paid Lunches for SY2014-15**	TOTAL Price Increase for SY 2016-17	TOTAL SY 2016-17 Annual Non-Federal Source Contribution
	\$ -	\$ -
<i>Note: Total price increase for SY 2016-2017 is based on the difference between the weighted average price entered above and SY 2016-2017 rounded DOWN requirement.</i>		

Enter total amount of Non-Federal Source Funds Contributed for SY 2011-12 through SY 2015-16	Annual Non-Federal Source Contribution Requirement for SY 2016-17
	\$ -

Price Increase Requirement for SY 2016-17 (with 10 cent cap)	SY 2016-17 Annual Non-Federal Source Contribution (with 10 cent cap)
\$ -	\$ -

Remaining Annual Non-Federal Source Contribution carried forward to SY 2017-18
\$ -

Remaining Credit carried forward to SY 2017-18
\$ -

[Go to SY 2016-2017 REPORT](#)

Note: This tool is created to allow the user to only enter the annual number of paid lunches and the amount of non-Federal Source funds contributed for SY 2016-17. If any other parts of the tool are modified, the user runs the risk of calculating an incorrect annual non-Federal source contribution. Users should not modify the tool's current functionality.

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## SY 2016-17 Split Price and Non-Federal Calculator

[Go to Instructions](#)

### SY 2016-17 Weighted Average Price Requirement

Requirement price to the nearest cent	Optional price requirement ROUNDED DOWN to nearest 5 cent
\$ 2.78	\$ 2.75

*Note: Above prices are based on adjusting SY 2015-2016 price requirement by the 2% rate increase plus the Consumer Price Index (2.97%)*

### SY 2015-16 Weighted Average Price Calculator

Enter the paid prices and number of paid lunches sold at each price for  
October 2015.

	Monthly # of Paid Lunches	Paid Lunch Price	Monthly Revenue	SY 2015-16 Weighted Average Price
1.			\$ -	
2.			\$ -	
3.			\$ -	
4.			\$ -	
5.			\$ -	
6.			\$ -	
7.			\$ -	
8.			\$ -	
9.			\$ -	
10.			\$ -	
<b>TOTAL</b>	-		\$ -	\$ -

*Note: SY 2015-16 Weighted Average Price equal to or above \$2.78 are compliant for SY 2016-17. \$2.78 is the difference between the Free and Paid reimbursement rates for SY 2015-16.*

### Total Price Increase for SY 2016-17

\$ -

### Required price increase for SY 2016-17 (with 10 cent cap)



\$ -
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<b>New Price Increase</b>	
Enter the new price increase for SY2016-2017 to assist in meeting the requirement. See optional Pricing Estimation Calculator below if needed.	

<b>Non-Federal Source Contribution Calculator for SY 2016-17</b>		
Enter the total paid lunch count (for all prices). ** Annual Non-Federal Source funds for SY2016-2017 are estimated based on the ACTUAL lunch count entered below		
<b>Enter annual # of Paid Lunches for SY 2014-15**</b>	<b>Total remaining required Price Increase</b>	<b>TOTAL SY 2016-17 Annual Non-Federal Source Contribution</b>
	\$ -	\$ -
Note: Total price increase for SY 2016-2017 is based on the difference between the weighted average price entered above and SY 2016-2017 rounded DOWN requirement.		

<b>Enter total amount of Non-Federal Source Funds Contributed for SY 2011-12 through SY 2015-16</b>	<b>Annual Non-Federal Source Contribution Requirement for SY 2016-17</b>
	\$ -

<b>Price Increase Requirement for SY 2016-17 (with 10 cent cap)</b>	<b>SY 2016-17 Annual Non-Federal Source Contribution (with 10 cent cap)</b>
\$ -	\$ -

<b>Remaining Annual Non-Federal Source Contribution Requirement carried forward to SY 2017-18</b>
\$ -

<b>Remaining Credit carried forward to SY 2017-18</b>
\$ -

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## (Optional)

Pricing Estimation Calculator				
Below is a tool allowing users to manipulate prices to achieve the required new weighted average price.				
	Monthly # of Paid Lunches	Paid Lunch Price	Monthly Revenue	Weighted Average Price
1.			\$ -	
2.			\$ -	
3.			\$ -	
4.			\$ -	
5.			\$ -	
6.			\$ -	
7.			\$ -	
8.			\$ -	
9.			\$ -	
10.			\$ -	
<b>TOTAL</b>	-		\$ -	\$ -

Note: This tool is created to allow the user to only enter the number of paid lunches and the related prices. If any other parts of the tool are modified, the user runs the risk of calculating an incorrect new average price. Users should not modify the tool's current functionality.

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### SY2016-2017 Weighted Average Pricing Report

*This report assists in tracking the pricing requirements and amounts carried forward for SY 2016-2017. Information on this report is used to determine the SY 2016-2017 weighted average price requirements.*

*Please print and keep in records.*

*NOTE: If information is changed in the tool, the report contents will change.*

#### Section 1: SY2016-2017 Weighted Average Paid Price Requirements

<b>A. SY 2016-17 Weighted Average Price Requirement*:</b>	<b>\$2.78</b>
<small>*This price will be entered into the SY 2017-2018 tool to determine the SY2017-2018 weighted average price requirements</small>	
<b>B. Optional Price ROUNDED DOWN to nearest 5 cents:</b>	<b>\$2.75</b>

#### Section 2: Amounts Carried Forward to SY 2017-2018

Select the SY 2016-2017 method used to ensure sufficient funds are provided for PAID Lunches

#### Average Weighted Price Adjustments

A. Remaining increase carried forward to SY 2017-18:	
B. Remaining credit carried forward to SY 2017-18:	
Enter in the new average weighted price for SY 2016-17:	

#### Non-Federal Source Contributions

C. Remaining Annual Non-Federal Source Contribution carried forward to SY 2017-18:	
D. Remaining Credit carried forward to SY 2017-18:	
Enter the amount of Non-Federal Source contributions for SY 2016-17:	
Enter Sources of Non-Federal Funds Contributed:	

#### Split Calculations

E. Remaining Annual Non-Federal Source Contribution carried forward to SY 2017-18:	
F. Remaining Credit carried forward to SY 2017-18:	
Enter the amount of Non-Federal Source contributions for SY 2016-17:	
Enter the new average weighted price for SY 2016-17:	

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<b>SY 2015-2016 Weighted Average Price Calculator</b>				
Enter current prices and number of lunches sold at each price using <b>October 2015</b> data.				
	<b>Monthly # of Paid Lunches</b>	<b>Paid Lunch Price</b>	<b>Monthly Revenue</b>	<b>SY 2015-16 Weighted Average Price</b>
1.			\$ -	
2.			\$ -	
3.			\$ -	
4.			\$ -	
5.			\$ -	
6.			\$ -	
7.			\$ -	
8.			\$ -	
9.			\$ -	
10.			\$ -	
<b>TOTAL</b>	-		\$ -	<b>\$ - is the SY2015-16 Weighted Average Price</b>

*Enter this price in Step 1 in unrounded requirement finder tab*

[Click to go back to SY 16-17 Non-Federal Calculator](#)

[Go to instructions](#)

Note: This tool is created to allow the user to only enter the number of paid lunches and the related prices. If any other parts of the tool are modified, the user runs the risk of calculating an incorrect new average price. Users should not modify the tool's current functionality.

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SY 2010-2011 Weighted Average Price Calculator				
Enter current prices and number of lunches sold at each price using <b>October 2010</b> data.				
	Monthly # of Paid Lunches	Paid Lunch Price	Monthly Revenue	SY 2010-11 Weighted Average Price
1.	2,504	\$ 2.30	\$ 5,759.20	
2.	2,367	\$ 2.55	\$ 6,035.85	
3.			\$ -	
4.			\$ -	
5.			\$ -	
6.			\$ -	
7.			\$ -	
8.			\$ -	
9.			\$ -	
10.			\$ -	
TOTAL	4,871		\$ 11,795.05	\$ 2.42 is the SY2010-2011 weighted average price

Enter this price in the Unrounded Requirement Finder tab

[Click to go back to Unrounded Requirement Finder](#)

[Go to instructions](#)

Note: This tool is created to allow the user to only enter the number of paid lunches and the related prices. If any other parts of the tool are modified, the user runs the risk of calculating an incorrect new average price. Users should not modify the tool's current functionality.

November 2015