

## **Committee on Weights XIV Report Recommendations for Changes to the Weighted Student Formula**

### **Introduction:**

The Hawai'i State Department of Education (Department) is committed to fostering lifelong learners, compassionate and ethical citizens, and a populace ready for college and their careers. The Department is committed to equipping our students with the knowledge, skills, and values necessary to be globally competitive and locally committed, capable of thriving in the international arena while positively impacting their communities right here in Hawai'i. To achieve these goals, it is vital to provide schools with adequate and reliable funding, ensuring they can plan and deliver an equitable education experience while factoring in the characteristics of each school's student population.

The Weighted Student Formula (WSF) is the State's principal vehicle for distributing general fund monies to schools. Yet its effectiveness can be eroded when revenues fail to keep pace with inflation, enrollment shifts, or abrupt changes in federal aid. The end of COVID-19 era stimulus funds and ongoing congressional debates over federal funding for education have introduced uncertainty about future federal support, further emphasizing the importance of a state funding model that can withstand fiscal turbulence.

With that context in mind, during the summer of 2025, the Department convened the Committee on Weights XIV, known as COW XIV, to review the WSF for School Year (SY) 2026-2027 and 2027-2028 as authorized by Hawai'i Revised Statutes (HRS), §302A-1303.6 ([Attachment A](#)). Based on recommendations from the Superintendent of Education and the Dean of the University of Hawai'i at Mānoa's College of Education, the composition of COW XIV was approved by the Hawai'i State Board of Education (Board) during their March 13, 2025, meeting ([Attachment B](#)). Pursuant to HRS §302A-1303.5 ([Attachment A](#)), the COW XIV's twenty members consisted of principals, teachers, and other members with the appropriate professional skills, experiences, and qualifications needed to facilitate the work of the committee.

Led by Chairperson (Chair) Sean Tajima and Vice Chairperson Stacey Bello, COW XIV focused on equitably distributing funds to schools in a manner that, to the extent possible, provides predictable, reliable, and flexible funding for principals while taking into consideration the unique needs of each school and each student.

The members of COW XIV generously volunteered their time, shared their invaluable expertise, and actively engaged in numerous topic discussions.

**COW XIV Members:**

<b>Member</b>	<b>Position and School / Office</b>
Sean Tajima (Chair)	Complex Area Superintendent, Campbell-Kapolei
Stacey Bello (Vice Chair)	Complex Area Superintendent, Ka'ū-Kea'au-Pāhoa
Christen Wilson	Special Education Teacher, Leeward District Office
Jackie Freitas	Teacher, Leilehua-Mililani-Waialua, Leilehua High
Wilhelmina Kealani Riturban	School Administrative Services Assistant, Castle-Kahuku, Castle High
Cindi Ahuna	O'ahu Complex Area Business Manager, Castle-Kahuku
Adri Wilson	Neighbor Island Complex Area Business Manager, Hilo-Waiākea
Dr. Nathan Murata	Dean, University of Hawai'i, College of Education
Christopher Sanita	Principal, Hāna-Lahainaluna-Lāna'i-Molokai, Hāna High and Elementary
Amy Manthei	Registrar, Nānākuli-Wai'anae, Wai'anae High
Komarey Moss	Principal, 'Aiea-Moanalua-Radford, Moanalua Middle
Kelly Bart	Principal, Kaimuki-McKinley-Roosevelt, Princess Miriam K. Likelike Elementary
Ray Carvalho	Principal, Kapa'a-Kaua'i-Waimea, Waimea Canyon Middle
Stanley Tamashiro	Principal, Campbell-Kapolei, 'Ewa Elementary
Mitch Otani	Principal, Farrington-Kaiser-Kalani, Kalani High
Christine Alexander	Principal, Leilehua-Mililani-Waialua, Waialua High and Intermediate
Mahina Anguay	Principal, Kapa'a-Kaua'i-Waimea, Waimea High
Daniel Espaniola	Principal, Hāna-Lahainaluna-Lāna'i-Molokai, Kaunakakai Elementary
Michelle Barber	Principal, Honoka'a-Kealakehe-Kohala-Konawaena, Waikoloa Elementary and Middle
David Dinkel	Principal, Hilo-Waiākea, Prince Jonah Kūhiō Kalaniana'ole Elementary

## Formula Overview:

The WSF, established by Act 51, Session Laws of Hawai'i 2004, aims to distribute operational funds to schools fairly, taking into account the number of students they serve and the specific needs and characteristics of those students. Schools annually use a "tentative allocation" calculated using projected enrollment to create financial plans for the upcoming academic year. The Financial Plan outlines the expected expenditure at the school level for necessities such as staff, programs, and essential services. The WSF allocations are updated with the latest actual enrollment three times throughout the school year. The first allocation update relies on the Official Enrollment Count (OEC) taken on the 10th day of the school year. This allocation establishes the minimum level of funding the school will have to work with. Then at the end of the first quarter and again at the end of the second quarter, upward allocation adjustments are made if the school enrollment increases from the OEC.

Each school's initial funding is calculated by assigning a specific dollar amount for every enrolled student, commonly referred to as the "value of one." Additional funding is provided in recognition of the educational needs of students with identified characteristics that affect their learning and academic performance, necessitating extra support and resources to support schools in providing equitable access to education. These differentiated weights encompass various factors, such as Gifted and Talented, English Language Learners, Economically Disadvantaged, and Transiency.

Pursuant to §302A-1303.5, the COW may:

1. determine which moneys shall be included in the amount of funds to be allocated through the weighted student formula;
2. create a list of student characteristics that will be weighted;
3. determine specific student weights, including their value;
4. recommend a weighted student formula to the board of education; and
5. perform any other function that may facilitate the implementation of the weighted student formula.

As such, COW XIV conducted a thorough review of the Department's general funded programs, current student and school characteristics, and deliberated proposed adjustments to the WSF.

It is anticipated that these COW XIV recommendations will be presented to the Board for its consideration in September 2025, allowing for the calculation of schools' tentative allocations for SY 2026–2027 planning purposes. Prior COW agendas, minutes, recommendations, as well as Board actions may be viewed on the Department's website.<sup>1</sup>

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<sup>1</sup> <https://sites.google.com/k12.hi.us/committee-on-weights/home?authuser=0>

**Recommendations:**

COW XIV has formulated a proposal for the allocation of the Department's WSF appropriation to better support school operations. The goal is to distribute the funds in a way that reflects the actual cost of educating a student. This distribution plan also takes into account the objectives and strategies outlined in the Department's and Board's Strategic Plan 2023-2029, which serves as the State's blueprint for public education.

In formulating their recommendations, COW XIV considered various factors, including valuable input from principals and other stakeholders who provided feedback. They also took into account information provided by program managers and drew from their own independent observations and experiences.

COW XIV held four public meetings on May 21, June 4, June 26, and July 9, 2025. The committee discussed and deliberated the following areas.

## **I. Weighted Student Formula Reserve Fund, Application Process**

### **Issue:**

Whether the application process for schools requesting funds from the WSF reserve fund should be revised.

### **Discussion:**

During the June 4, 2025, meeting, Office of Fiscal Services' (OFS) Gary Zane, Budget Specialist from the Budget Branch, provided a background of the reserve fund and application process. The reserve fund sets aside funds outside of the weighted student formula calculation to provide opportunities for combination, geographically isolated, or low enrollment schools, as well as schools experiencing extraordinary circumstances, to apply directly for the funding.

At the June 26, 2025 meeting, Assistant Superintendent (AS) of OFS, Brian Hallett, confirmed that the funding for this supplemental support will now be provided through general funds, as federal funding previously used to fund this initiative has expired. Kimberly Chee, Budget Branch Budget Specialist, reviewed the existing rubric and fielded questions about explicitly listing transiency as a factor. After discussion, the committee agreed that the current rubric already gives Complex Area Superintendents the flexibility to address unique circumstances and therefore no changes were warranted.

### **Recommendation:**

No action required. Maintain the current reserve fund application process.

## II. Rural and Remote Schools

### Issue:

Are small and remote schools receiving adequate and equitable funding?

### Discussion:

Overview of the recommendation from the COW XIII meetings:

- Continue to provide \$250,000 to each of the eight remote schools (Ka'ū High and Pāhala Elementary, Hāna High and Elementary, Kaunakakai Elementary, Lāna'i High and Elementary, Moloka'i High, Molokai Middle, Kilohana Elementary, Maunaloa Elementary); and
- Provide \$250,000 to the six identified small schools / non-remote schools (Ka'a'awa Elementary, Waiāhole Elementary, Keolu Elementary, Ha'aheo Elementary, Hōnaunau Elementary, Ho'okena Elementary).

At the June 4, 2025, meeting, Principal Christopher Sanita of Hāna High and Elementary recommended keeping the \$250,000 for each of the eight previous remote schools, plus adding a rural weight in the WSF. Neighbor island schools already have a weight. Principal Sanita recommended that for rural schools, the standard should be two hours away from civilization. AS Brian Hallett indicated that the six smallest and eight remote schools already have permanent extra funds within the WSF, and the \$2.5 million WSF Reserve is rarely exhausted, and any balance should be reallocated to all schools by formula. Members urged earlier notice of allocations; Ray Carvalho proposed sending any leftover reserve money straight to rural schools instead of requiring applications. Cindi Ahuna wanted different scenarios with rural and then rural plus \$250k for small schools. The Office of Fiscal Services calculated the impact of various scenarios for the committee.

Reconvening on June 26, 2025, Kimberly Chee of OFS modeled three options (0.008 or 0.016 weights, or a \$200 per pupil add on) that would shift up to \$471,000 to eight rural campuses while shaving \$0.65 - \$2.74 from all schools by reducing the every other school's base "weight of 1." Several members objected, while others cited increased freight and travel costs. As a result, a motion to adopt the 0.016 weight failed, and the status quo of a \$250 000 supplement plus continued access to the WSF Reserve application process, with no change in per-pupil weight, remained.

AS Brian Hallett also confirmed that, starting SY 2025-2026, the \$3.5 million required to provide this supplemental support will be provided through the existing WSF general fund budget, as one time federal funding previously used to fund this initiative had expired and the Legislature only provided one-time funding for SY 2024-2025. A motion made by Principal Sanita to implement a 0.016 rural weight allocation failed (2 ayes, 14 noes). Members reaffirmed the value of supplemental support that provides predictable funding regardless of annual enrollment variations.

**Recommendation:**

No action required. Retain the \$250,000 supplemental allocation for remote and small schools.

### **III. Neighbor Island Schools**

**Issue:**

Should there be an adjustment to the Neighbor Island weight?

**Discussion:**

On June 4, 2025, the COW XIV heard that the Neighbor Island weight now stands at 0.008, up from 0.004, to offset rural schools' extra shipping, inter-island travel, professional development, and similar costs.

**Recommendation:**

No action required. No change to the weight for Neighbor Island schools.



#### **IV. School Food Service Staffing**

**Issue:**

The committee requested information about how school food service position funding is allocated. In particular, a greater understanding of when breakfast and lunch participation rates are calculated to determine how much cafeteria staffing support each school receives.

**Discussion:**

The topic of how schools are allocated funds for school food service positions is not an issue the committee can directly address. However, future staffing formula changes could have WSF implications.

During the June 4, 2025, meeting, Carol Gonsales, Educational Specialist with the Leadership Institute Branch of the Office of Talent Management, discussed how schools determine the allocation of funds for schools to hire school food service positions. The Department serves approximately 109,000 daily meals, with 45.5% of them being free or reduced meal costs. Funding for staff is based on an average daily breakfast and lunch participation calculation of 20 days between mid-August and mid-September.

Principal Michelle Barber of Waikoloa Elementary and Middle School asked about a timeline for reorienting from November 14 to the end of the school year for determining staffing numbers to make cafeteria staffing more stable throughout the year.

At the June 26, 2025 meeting, Interim School Food Services Administrator, Sue Kirchstein, informed the committee that the Department has commissioned an independent labor study for the 2025-2026 school year. The study will benchmark Hawai'i against twelve comparable mainland districts, conduct time-and-motion analyses, and model alternative staffing ratios, including the impact of summer feeding.

**Recommendation:**

No action required. However, because any future staffing formula change could have WSF implications, the committee requests that the completed study be transmitted to the next COW.

## **V. Learning Centers**

### **Issue:**

Should schools with learning centers be given a weight in the WSF?

### **Discussion:**

On June 4, 2025, Leilehua High School teacher, Jackie Freitas, identified 17 different pathways that exist statewide within learning centers, which focus students on greater in-depth learning on a specific educational career pathway. Each learning center receives \$17,000 and a half-time position. For learning centers, a student does not need to be a part of that school to enroll. There are 29 learning centers and \$1.5 million in state funding throughout the public school system. The funding for learning centers is currently outside of the WSF.

The overall consensus of the committee was that learning centers are a categorical funding issue (spending decision once a school is allocated funding) as opposed to a weighted student formula issue (how much money is provided to each school).

### **Recommendation:**

No action required.

## **VI. Transiency and Military Enrollment**

### **Issue:**

Some schools experience significant disruptions to their enrollment due to circumstances beyond their control. Some examples include military schools or schools with larger homeless populations. This disruption can impact school operations and WSF funding.

### **Discussion:**

On June 4, 2025, Sherilyn Carlson, Military Liaison with the Community Engagement Branch of the Office of Strategy, Innovation and Performance, and Wendy Sekiya, Budget Execution Administrator, presented on transiency and military enrollment fluctuations at schools. At the school level, 3.45% of students are projected to be transient in SY 2025-2026.

The transiency weight was implemented to support students who enroll in the middle of the academic year and are assumed to require additional resources to catch up. Initially, it was introduced for military schools, but later expanded to include all students meeting specific criteria. The weight is calculated based on historical data, projecting the estimated count of transient students for the upcoming school year. The current weight is 0.05, increased from the original 0.025 by the Board in 2006. The transiency weight per student is about \$300.

The committee discussed topics related to transiency and military enrollment including:

- Schools that face typical transiency versus schools with a specific circumstance that causes a one-time transiency issue.
- Currently, schools with transiency issues can apply for the reserve fund and justify increased funding.
- Increasing housing and homelessness issues amongst youth.
- While the military tries to move families during the summer to reduce school related transitional issues, sometimes students do arrive throughout the school year.
- Identified the need to come up with a transiency definition.

### **Recommendation:**

No action required. Retain the 0.05 transiency weight. Schools experiencing extreme mid-year churn are encouraged to seek Reserve Fund assistance.

## **VII. Kaiapuni (Hawaiian Language Immersion Program/HLIP) categorical program funds**

### **Issue:**

Should Kaiapuni (HLIP) be moved from categorical funding into the WSF?

### **Discussion:**

During the June 26, 2025, meeting, Kauai Sang and 'Ānela Iwane of the Office of Hawaiian Education (OHE) provided an overview of the Kaiapuni program to the committee.

Kaiapuni enrollment now exceeds 3,200 students, having grown 19% over five years, yet 45 kumu positions, about one in five, remain vacant across 22 sites. The program relies on a categorical appropriation of \$6,900,000 (Fiscal Year 2025), 63% of which pays personnel. The Office of Hawaiian Education argued that categorical protection is essential while they complete a statewide Kaiapuni strategic plan, slated for release in the first quarter of 2026, that will establish long-term resource and staffing standards.

The committee concurred that transparency and accountability would be best preserved by maintaining categorical status until the strategic plan is in place, after which integration into WSF can be reconsidered.

### **Recommendation:**

No action required. Continue Kaiapuni as a categorical allocation through at least the 2026-27 school year and revisit WSF integration once the strategic plan has been adopted and staffing pipelines are secure.

## **VIII. Change the statutory requirement to meet every two years.**

### **Issue:**

Should the COW meet more or less frequently?

### **Discussion:**

During the June 26, 2025 meeting, Board Chairperson Roy Takumi provided a brief history of the creation of the WSF. He reminded members that the committee met annually during the WSF's formative years before the statute was amended to require meetings every two years. He urged the committee to reflect on whether that cadence still makes sense or if the committee should convene more or less frequently.

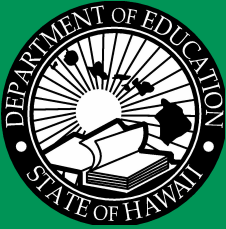
Principal Mitch Otani, who has served since COW III, shared that a biennial cycle continues to provide timely, substantive recommendations to lawmakers. Principal Sanita echoed this view, describing a three-year cycle as too long, given fiscal volatility, and an annual cycle is too brief to generate meaningful data.

### **Recommendation:**

No action required. Maintain the statutory requirement that the COW convene every two years.

**Attachments**

- A. Hawai'i Revised Statutes §302A-1303.5 Committee on Weights and §302A-1303.6 Weighted Student Formula
- B. Board of Education approved Committee Composition Memorandum



*HAWAI'I STATE*

# **Department of Education**

## **Background for the Committee on Weights (COW) and Weighted Student Formula (WSF)**

**Hawai'i State Board of Education, Finance and Infrastructure  
Committee  
September 18, 2025**

Sean Tajima

COW XIV Chairperson & Interim Assistant Superintendent for  
the Office of Campus Operations and Support

Brian Hallett

Assistant Superintendent for the Office of Fiscal Services &  
Chief Financial Officer



# Committee on Weights (COW)

## Created through Act 51, SLH 2004

- [Section 302A-1303.5 HRS](#)

## Composition of the Committee:

- Consists of educators, school staff, and community members;
- Determined by the Hawai'i State Board of Education (Board), based on a recommendation from the Superintendent and the University of Hawai'i at Manoa Dean of the College of Education; and
- Chairperson of the COW is the Superintendent or his/her designee

## Tasked with:

- Creating a list of student characteristics to weight;
- Creating a system of weights to apply to determine the relative cost of educating a student;
- Determining weights and their value;
- Recommending a Weighted Student Formula (WSF) to the Board; and
- Meeting at least every odd numbered year to review the formula and recommend changes, if needed, to the Board.

# Weighted Student Formula (WSF)

Allocation methodology established through Act 51, SLH 2004

- [Section 302A-1303.6 HRS](#)





## Weighted Student Formula [\(public webpage\)](#)

- The Hawai'i State Department of Education supports equitable educational opportunity for all students.
- Weighted Student Formula (WSF) is a way to allocate funds to schools based on student educational needs.
- WSF is over 47.1% of the general fund budget, and 83.4% of the EDN100 general fund budget.



### Underlying Assumptions for Equity:

1. Schools with similar students should get a similar amount of funds.
2. Schools with students who have a harder time becoming proficient should get more funds to support their efforts.



# Calculation of WSF

**Weighting Factors:** The characteristics and level of additional support allocated as approved by the Board (based on the COW's recommendation).

Details of WSF <i>TENTATIVE</i> Allocation Calculation based on FY2025-26 Preliminary Appropriation and Projected Enrollment for calculation of tentative allocations for Financial Plans					
	<u>Total PROJECTED Enrollment</u> <sup>1</sup>	<u>Weighting Factor</u>	<u>Weighted PROJECTED Enrollment</u>	<u>\$ per Student</u>	<u>TOTAL ALLOCATION</u>
1 Pre-K (SpEd)	1,726	1.000	1,726.00	\$5,933.12	\$ 10,240,572
2 K - 2	33,978	1.000	33,978.00	\$5,933.12	\$ 201,595,683
3 Other Elem	40,794	1.000	40,794.00	\$5,933.12	\$ 242,035,855
4 Middle	29,281	1.000	29,281.00	\$5,933.12	\$ 173,727,800
5 High	46,050	1.000	46,050.00	\$5,933.12	\$ 273,220,354
6 <b>Subtotal</b>	<b>151,829</b>		<b>151,829.00</b>		<b>\$ 900,820,263</b>
<sup>1</sup> Total Enrollment includes General Education, Special Education and Pre-K (SpEd) at a rate of 1.00 per student.					
<b><u>Student Characteristics</u></b>					
7 Grade Level Adjustment					
8 Middle	29,281	0.025	740.28	\$150.00	\$ 4,392,160
9 K-2 Class Size	33,978	0.150	5,096.70	\$889.97	\$ 30,239,352
10 English Language Learners (Aggregate)	20,288				\$ 32,517,039
11 Fully English Proficient (FEP)	3,176	0.0753	239.12	\$446.76	\$ 1,418,719
12 Limited English Proficiency (LEP)	11,012	0.2258	2,486.51	\$1,339.70	\$ 14,752,779
13 Non-English Proficient (NEP)	6,100	0.4516	2,754.96	\$2,679.40	\$ 16,345,542
14 Economically Disadvantaged	75,513	0.100	7,551.30	\$593.31	\$ 44,802,798
15 Gifted & Talented	4,481	0.265	1,187.38	\$1,572.28	\$ 7,044,874
16 Transiency	5,146	0.050	257.32	\$296.66	\$ 1,526,705
17 <b>Subtotal</b>			<b>20,313.57</b>		<b>\$ 120,522,928</b>
<b><u>School Characteristics</u></b>					
18 Neighbor Island	49,127	0.008	393.02	\$47.46	\$ 2,331,813
19 <b>Subtotal</b>			<b>393.02</b>		<b>\$ 2,331,813</b>
20 <b>TOTAL WEIGHTED ALLOCATION</b>	<b>151,829</b>		<b>172,535.59</b>		<b>\$ 1,023,675,003</b>



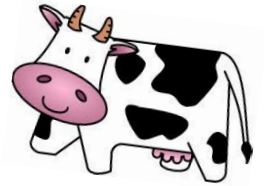
# Calculation of WSF

**Base Funding:** A set dollar amount each school is provided, regardless of enrollment, in recognition that a minimum level of resources are required to “open the doors” for the school.

		<u>Total PROJECTED Enrollment</u> <sup>1</sup>	<u>Weighting Factor</u>	<u>Weighted PROJECTED Enrollment</u>	<u>\$ per Student</u>	<u>TOTAL ALLOCATION</u>
	<b>Non-Weighted School Characteristics</b>					
	Base Funding - per school based on school type		<i>(no. of schools)</i>			\$ 103,867,000
21	Elem		168	\$336,000		\$ 56,448,000
22	Elem - Multi-Track		1	\$454,000		\$ 454,000
23	Middle		39	\$516,000		\$ 20,124,000
24	Middle - Multi-Track		0	\$634,000		\$ -
25	High		34	\$527,000		\$ 17,918,000
26	Combination Schools					
27	K-12		5	\$827,000		\$ 4,135,000
28	K-8		3	\$591,000		\$ 1,773,000
29	6-12		5	\$603,000		\$ 3,015,000
30	Subtotal		255			\$ 103,867,000
31	<b>TOTAL WSF FUNDS AVAILABLE FOR TENTATIVE ENROLLMENT ALLOCATION</b> <sup>2</sup>					<b>\$ 1,127,542,003</b>



# Committee on Weights (COW) and Weighted Student Formula (WSF)



Questions?