Budget Model Working Group
Union Rm. 181
January 18, 2013
8:30 a.m. – 10:07 a.m.

Meeting Notes:


Not Present: Asif Ashiqali, James Cook, Paul Fischer, Susan Fontana, Joyce Latham, Gwat Yong Lie, Patrice Petro, Tim Smunt, Doug Woods 9

Current Resource Allocation Model (see attached handout)

A brief discussion was held regarding the current resource allocation model.

Review & discussion of existing comprehensive budget model

An exercise was conducted to allow members of the BMWG to review the prevailing budget models (incremental, formula, RCB, and zero-based) used in higher education and to align the dominant characteristics of each model with the desired requirements of a new UWM budget model, as outlined in the BMWG’s Guiding Principles. Members of the working group first, individually and then, in small groups, compared the current budget model with the four (4) comprehensive models. Each group was asked to agree on which models best aligned with each of the BMWG’s Guiding Principles and report out on the findings. The data was collected and combined into one data sheet which identifies which budget model best addressed the stated requirements according to the Guiding Principles.

The prevailing sentiment was that the RCM and Formula methods would best address UWM’s new budget model requirements identified in the Guiding Principles. Hence, it was agreed that a hybrid of RCM and Formula would be the best approach to resource allocation at UWM.

It should be noted that a vote was not taken on this recommendation but that one will be taken at the March 1st meeting of the BMWG.
Stakeholder Engagements

A calendar was handed out with the scheduled listening sessions. It was strongly encouraged that the teams should schedule their listening sessions quickly if they have not already done so. Members were reminded that the sessions should be completed by February 28, 2013.

Meeting adjourned 10:07 a.m.