



CENTAGE CASE STUDY

Lutheran Social Services

How Lutheran Social Services Brought 100 Program Managers Into a Collaborative Budget With Centage



Industry: Nonprofit

Based In: West Allis, WI

Employees: 501-1,000 employees

GL System: Acumatica



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Martin Nguyen

Senior Financial Analyst, LSS

From Mission to Financial Challenge

Driven by the infinite worth of every person, **Lutheran Social Services of Wisconsin and Upper Michigan (LSS)** believes communities are stronger when everyone has what they need to live independently and thrive. LSS is in the community providing help for children & families, resources for affordable housing, assistance with mental health & substance use, skills for life & work, and connections to community support. Every year, nearly 30,000 people come to LSS with incredible odds stacked against them.

With compassion, their nearly 800 colleagues deliver services with:

Experience: LSS has 140 years of proven results as a social service provider. Effectiveness: Over 95% of the people served say LSS improved the quality of their lives. **Efficiency:** LSS leads the industry average on the percentage of dollars raised that are applied to direct client care.

That scale comes with financial complexity. Each of LSS's programs has a manager responsible for planning revenue and expenses, with more than 100 contributors in total. The finance team then consolidates those inputs, aligns them with leadership's goals, and prepares board-ready budgets.

"It's a six-month process for us," said Martin, a senior financial analyst at LSS. "From July through November, program managers are entering their budgets, finance is consolidating, and eventually we're preparing reporting for the CFO, COO, and board approval."

For years, that process was both essential and overwhelming. The challenge was finding a way to bring so many voices together without losing control or accuracy.

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“It’s just so much easier. Before, one break in Excel messed everything up. Now, everything updates in one place.”

Martin Nguyen
Senior Financial Analyst

 **Lutheran Social Services**
of Wisconsin and Upper Michigan, Inc.

Finding a Middle Ground: Top-Down Meets Collaborative

Like many nonprofits, LSS wrestled with two competing approaches:

- **Top-down budgeting**, where leadership sets strict allocations and finance enforces them.
- **Collaborative budgeting**, where program managers contribute directly, informed by data from finance.

LSS found its solution in a **hybrid approach powered by Centage**. Leadership sets the calendar and goals. Finance provides each manager with the data they need — P&Ls, productivity trends, headcount analysis — and then those managers enter their program-level budgets directly into Centage.

“We provide them with the information that sets the stage,” Martin explained. “They take that and enter their own revenue and expenses. It’s collaborative, but still structured.”

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“The budget tool has been very accessible and intuitive”

Martin Nguyen
Senior Financial Analyst

 **Lutheran Social Services**
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How Centage Helps

With Centage, LSS has been able to balance structure with collaboration:

- Variance reporting allows program managers to see how their numbers compare to prior years in real time.
- The personnel module ensures sensitive salary information stays in finance's hands, while still aligning staffing costs with program budgets.
- Training sessions each year ensure that both new and returning budget users feel confident working in the system.
- And when challenges arise — like syncing forecasts to actuals or upgrading accounting integrations — Centage's support team has been quick to respond.

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The Result: Aligned Budgets, Stronger Mission

Today, LSS runs a budget process that engages more than 100 program managers without collapsing under the weight of complexity.

Finance maintains oversight and accuracy, program leaders have ownership in the numbers, and the board receives budgets aligned with the organization's mission and goals.

For a nonprofit serving thousands of individuals and families across Wisconsin and Michigan, that alignment is more than financial hygiene— it's mission-critical.

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“We know the trade-offs, we know the assumptions, and when the board looks at our plan, we can stand behind it.

That's what makes collaborative budgeting worth it.”

Martin Nguyen
Senior Financial Analyst

 **Lutheran Social Services**
of Wisconsin and Upper Michigan, Inc.



Products used:
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