



## **From 8 Months to 48 Hours:** How the YMCA of Lansing Transformed Its Budget Cycle with Maner Costerisan

By partnering with Maner Costerisan, the YMCA of Metropolitan Lansing modernized its financial systems to improve forecasting and direct more resources toward programs that strengthen the community.

# Introduction



Founded in 1877, the YMCA of Metropolitan Lansing is a community cornerstone serving more than 10,000 members across three branches in the Greater Lansing

region of Michigan. With a \$7.1\* million operating budget, the YMCA delivers a wide range of programs including childcare, summer camps, fitness classes, senior support, swim lessons, and nutrition and meal programs. Guided by its mission to build a healthy spirit, mind, and body for all, the YMCA works to remove financial barriers so every child, family, and senior can access its services.

Managing this scope of programming requires significant financial oversight. Each branch maintains its own budget, and within those branches, departments track and report separately.

The result is a highly complex financial structure that demands accurate, timely systems to ensure the YMCA's resources are directed where they are needed most.

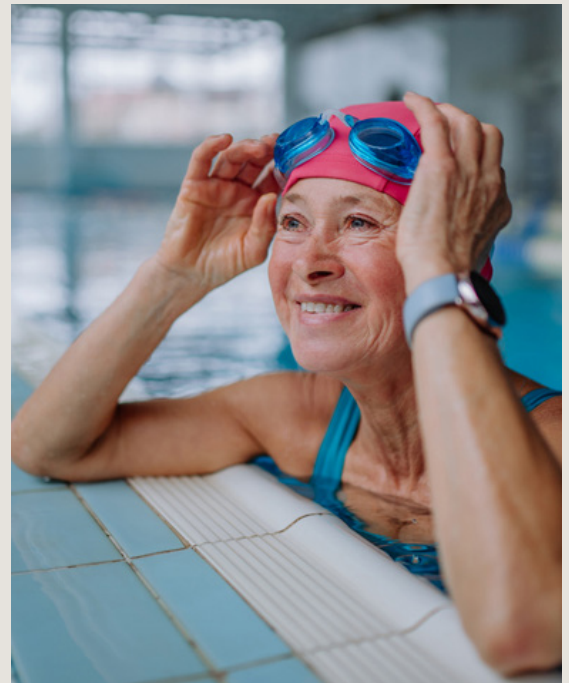
## At a Glance: The YMCA of Metropolitan Lansing

- Operating Budget: \$7.1M\*
- Members Served: 10,000+
- Branches: 3 in Greater Lansing
- Previous System: Microsoft Dynamics Great Plains + Excel
- New System: Sage Intacct + Martus

\* Current to publication date: 9/2025

## Key Outcomes:

- Budget cycle reduced from 8 months → 48 hours
- Forecasting enabled with real-time data
- Staff capacity reallocated to mission-driven work





# The Challenge

Before working with Maner Costerisan, the YMCA of Metropolitan Lansing relied on Microsoft Dynamics Great Plains, an older accounting platform, along with massive Excel files to manage its finances. Budget development often stretched as long as eight months, and a single broken formula could take days to untangle.

***"Our lack of efficiency, especially around our finance software, was causing us countless pain points. These delays took attention away from serving our branches and members."***

**–Casey Thompson, President and CEO**



Board reporting was consistently delayed. In some years, budgets were not approved until February or March—well into the fiscal year. Forecasting was almost impossible, leaving leadership with a 45-day lag in financial visibility. This made it difficult to anticipate cash flow challenges or respond to emerging issues in real time.

In 2020, the pandemic added further strain. After significant staffing losses, fewer people were available to manage finance processes, and branches often had to wait on approvals or transfers while the finance team was tied up correcting spreadsheets.

# The Solution

When Casey Thompson became President and CEO, she began a comprehensive review of every major system at the YMCA. Nearly 90 percent of processes were updated, with financial operations at the top of the list.

As Thompson explained, stepping into the CEO role brought new responsibilities and perspective: “Even though I’m a seasoned YMCA professional, I was new at being a CEO, and that role is different,” she said. “The responsibilities that come with it are different. You’re positioning the whole organization for success.”

At the same time, the YMCA was rebuilding from pandemic-era staffing losses and needed a partner that could deliver both expertise and support. A conversation with a Maner Costerisan CPA at a local event opened the door. What began as guidance on employee tax credits soon expanded into a trusted partnership. Thompson recalls: “It was a genuine human-to-human conversation. That’s when I knew we had a partner who understood nonprofits like ours.”

Maner Costerisan brought more than technical know-how. Their team provided CPA services, nonprofit expertise, and hands-on guidance in selecting Sage Intacct and Martus, platforms that could integrate seamlessly to eliminate manual re-entry, improve accuracy, and provide real-time financial insights. Beyond implementation, Maner trained staff, streamlined processes, and continues to serve as an extension of the YMCA’s team.

## Leadership Spotlight: Casey Thompson

*President & CEO, YMCA of  
Metropolitan Lansing*



Casey Thompson became the YMCA of Metropolitan Lansing’s President and CEO in 2022, the first woman to hold the position in the organization’s 145-year history.

Her career with the Y began in 2003 at the Westside branch, where she worked in the child watch program. Over the next two decades, she advanced through a variety of roles, including Vice President of Operations and Interim CEO, before stepping into the top leadership role.

Among her many accomplishments is the creation of the YMCA’s Healthy Living Mobile Kitchen, which has provided more than 400,000 meals to children and families across Lansing since 2016.

***As Thompson reflected: “Every interaction I’ve ever had with Maner has been professional. They put clients first, and their expertise spans everything. I feel like I have a massive team behind my team.”***

# The Team Behind the Transformation

*For the YMCA of Metropolitan Lansing, success wasn't just about new software. It was about having a trusted team to guide every step of the journey.*



**Jessica Fleet, CPA, CHFP, Principal**

Opened the door by helping the YMCA navigate employee tax credits, sparking a trusted partnership.



**Justin Klein, PMP, Project Manager**

Led the system implementation, managing the transition off outdated tools and ensuring Sage Intacct and Martus were configured to meet the YMCA's complex needs.



**Kim Halfmann, Senior Advisor of Outsourced Services**

Serve as the YMCA's dedicated accountants, applying their expertise in Sage Intacct and Martus to manage ongoing financial operations and ensure the systems deliver consistent value.



**Lindsey Janzen, CPA, Manager**

*Together, this team became an extension of the YMCA's finance staff, streamlining operations and strengthening decision-making.*

# The Results

By modernizing its financial systems with Sage Intacct and Martus, the YMCA of Metropolitan Lansing achieved measurable improvements in budgeting, reporting, and staff efficiency.

## ***Budget Process Transformation***

The YMCA's budgeting process, which once stretched from August until March before board approval, has been **reduced to as little as 48 hours**. By implementing Sage Intacct as their financial backbone and Martus as the integrated budgeting and forecasting tool, leadership transformed what was once a stressful, months-long ordeal into a streamlined, collaborative process. In their first year on the new

system, they completed the full budget in just four weeks. **Today, the cycle is completed months in advance**—approved in January last year, with the current cycle on track to finish by November.

*"I've never done so many high-fives during the budget process. It's literally life-changing for our whole staff."*

**—Casey Thompson, President and CEO**

## ***Improved Reporting and Forecasting***

With Sage Intacct and Martus, branch- and department-level financials are available instantly. Leaders no longer work from outdated numbers but can make **real-time decisions based on live data**. Forecasting has become a core strength: the YMCA can now anticipate tight cash flow months, recognize seasonal trends, and adjust proactively rather than reactively.

Integration with fundraising systems ensures leadership has a complete picture of resources each week. The board now benefits from timely, accurate reporting that supports more informed discussions and decisions.

## ***Reallocation of Resources***

The efficiency gains also translated into significant workforce benefits. **Finance staff who once worked excessive hours can now manage workloads within a normal schedule, freeing up capacity to support branches and members**. Leaders across locations collaborate in Martus without needing to drive in for in-person budget meetings, saving both time and effort. As Thompson explained, "When you free up people power to align with the work we need for our members and community, it's a massive win."



# The Impact

The adoption of Sage Intacct and Martus, with Maner Costerisan's support, has reshaped how the YMCA of Metropolitan Lansing manages its operations. By reducing the administrative burden of budgeting and reporting, staff and leadership now dedicate more energy to mission-driven work, from building relationships with members to fundraising for critical programs.

With modern financial systems in place, the YMCA is operating more efficiently today and positioning itself for long-term sustainability. These improvements ensure that resources can be directed where they make the greatest difference: strengthening programs, supporting members, and amplifying the Y's impact across the Lansing community.



## Build Efficiency That Fuels Mission Impact

Maner Costerisan helps nonprofits streamline financial operations, improve reporting, and unlock staff capacity so teams can stay focused on their mission. Our nonprofit technology team brings deep expertise in solutions like Sage Intacct and Martus, guiding organizations through selection, implementation, and long-term success.



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Talk To An Expert:**



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