THE MORRISON FAMILY YMCA

The Case for Preserving a Community Asset

A Public-Interest White Paper on the Proposed Sale, Nonprofit Stewardship, Community Impact, and a Path Forward

October 30, 2026

Purpose: To inform donors, elected officials, community leaders, YMCA stakeholders, and residents about the proposed sale of the Morrison Family YMCA in Ballantyne, Charlotte, North Carolina, and to advocate for a transparent, comprehensive evaluation of alternatives that preserve the property's community-serving purpose.

EXECUTIVE SUMMARY

The proposed sale of the Morrison Family YMCA represents more than a real estate transaction. It represents a fundamental decision about the future of an important community institution, the stewardship of charitable resources, and the responsibility of a major nonprofit organization to the communities it serves.

On June 17, 2026, the YMCA of Greater Charlotte announced that its Board of Directors had approved a $42.5 million purchase and sale agreement with Moments of Hope Church for the Morrison Family YMCA property. The facility is expected to remain operational until the anticipated summer 2027 closing.

The YMCA has explained that the transaction is part of a broader strategy to address organizational financial challenges, modernize aging facilities, expand programming, and strengthen its long-term financial position.

Those organizational challenges are real and deserve serious consideration.

However, the existence of financial pressure does not independently establish that selling Morrison is the most appropriate, financially responsible, or mission-consistent solution.

The Morrison YMCA has served the Ballantyne and South Charlotte community for more than two decades. It is a place of physical wellness, youth development, childcare, recreation, senior engagement, social connection, and community identity.

The proposed transaction raises important questions:

1. Was the property independently appraised, and was the $42.5 million price established through a sufficiently competitive process?
2. Were alternative buyers, partnerships, financing structures, and community-supported acquisition options evaluated?
3. Was the financial case for selling Morrison compared against the financial case for retaining and reinvesting in it?
4. Were the interests of Morrison members, donors, employees, community partners, and the surrounding community adequately considered?
5. What enforceable commitments will guarantee continued YMCA services in Ballantyne after the transaction?
6. How will the proceeds be allocated, accounted for, and measured against the benefits promised to the broader YMCA community?

This paper advances a straightforward position:

The Morrison YMCA should not be treated simply as a disposable real estate asset. Its disposition should be evaluated against the YMCA's charitable mission, its history, the community's continuing needs, and the availability of viable alternatives.

We advocate for an independent review, complete financial transparency, meaningful community participation, and a serious examination of alternatives that could preserve Morrison as a community-serving institution.

Our objective is not to undermine the YMCA. It is to strengthen the YMCA, protect community value, and ensure that decisions affecting charitable assets reflect the highest standards of stewardship.

Important qualification: This paper is an advocacy and public-policy document, not a legal opinion, financial audit, or independent appraisal. Questions and concerns are identified for investigation and should not be interpreted as established findings of misconduct or legal violations.

THE BACKGROUND: WHAT IS HAPPENING RIGHT NOW?

The Morrison YMCA

The Morrison Family YMCA, located at 9405 Bryant Farms Road in Charlotte, has been an important institution in the Ballantyne and South Charlotte area for approximately 25 years. Its value extends beyond the building and underlying real estate.

The facility provides a setting for:

- Health, fitness, and wellness.
- Youth sports and development.
- Swimming and water safety.
- Childcare and after-school programs.
- Summer camps and family activities.
- Senior fitness and engagement.
- Community partnerships and social connection.

The Morrison YMCA is part of a broader charitable service network operated by the YMCA of Greater Charlotte.

The Sales Transaction with Moments of Hope Church

On June 17, 2026, the YMCA announced a $42.5 million purchase and sale agreement with Moments of Hope Church. The buyer intends to redevelop the property for its church and related community activities. The YMCA has stated that the Morrison facility will continue operating until the anticipated summer 2027 closing.

The organization has also indicated that some programs will be transferred to nearby YMCA facilities, including Sara's YMCA, Brace Family YMCA, Hemby Program Center, and Harris YMCA. However, the detailed, long-term service delivery plan for Morrison's existing members and families **remains an important matter for public scrutiny**.

The Greater YMCA's Financial Circumstances

The YMCA has publicly acknowledged substantial financial challenges following the COVID-19 pandemic.

Its 2024 Form 990 reports:

- Revenue: approximately $74.1 million.
- Expenses: approximately $85.5 million.
- Annual deficit: approximately $11.4 million.
- Reported net assets: approximately $142.6 million.

The YMCA has also stated that its facilities require more than $100 million in repairs and modernization. In September 2026, YMCA leadership provided additional context about

declining membership, increased operating expenses, organizational restructuring, and the need for additional capital. These circumstances establish the need for a thoughtful financial recovery strategy.

They do not, without additional analysis, establish that the Morrison sale is the best available strategy.

The Save the Morrison Coalition Advocacy Campaign

A grassroots coalition is pursuing five immediate objectives:

1. Build a broad network of donors, members, families, civic leaders, and community partners.
2. Obtain and analyze the transaction's financial and governance documentation.
3. Commission or support an independent evaluation of retention and alternative ownership structures.
4. Present a credible, financially supported alternative to YMCA leadership.
5. Maintain a constructive dialogue with the YMCA, elected officials, and other relevant stakeholders.

Coalition communications are always fact-based, respectful, and focused on the public interest.

The objective is to create a solution, not simply to create opposition.

WHAT IS THE PROBLEM?

The central issue is whether the YMCA of Greater Charlotte has adequately demonstrated that selling the Morrison Family YMCA is the best available way to fulfill its charitable mission and serve the long-term interests of the communities that depend on it.

The community has been presented with a transaction and a general organizational reinvestment rationale.

What remains essential is a transparent comparison of the transaction against realistic alternatives.

A $42.5 million sale converts a long-term community-serving property into financial proceeds. Those proceeds may support important organizational investments, but the sale also permanently transfers control of the Morrison property and eliminates the existing YMCA facility at that location.

The decision therefore involves competing considerations:

- Immediate financial benefit versus long-term community value.
- Regional organizational priorities versus local service needs.
- Real estate monetization versus continued investment in an existing facility.
- Board fiduciary responsibilities versus meaningful stakeholder participation.
- Promised future programming versus an established physical community institution.

The concern is not that the YMCA should never sell property.

The concern is whether this disposition has been adequately justified, independently evaluated, and structured to protect the community interests involved.

WHAT ARE THE COMMUNITY'S PRIMARY GRIEVANCES?

The following grievances represent the principal areas requiring answers and independent examination. They are questions of governance, stewardship, transparency, and public accountability—not findings of misconduct.

Grievance 1: Insufficient publicly available financial justification

The YMCA has identified significant financial challenges and capital needs. However, the public needs a transaction-specific financial analysis demonstrating:

- The financial performance of Morrison as an individual facility.
- The property's operating costs and capital requirements.
- The property's contribution to the overall YMCA organization.
- The independent market value of the property.
- The financial assumptions supporting the $42.5 million sale.
- The expected net proceeds after transaction expenses and liabilities.
- The specific allocation and intended use of the proceeds.
- The projected financial impact of retaining Morrison.

Our position: A major charitable asset should not be disposed of without a transparent and defensible comparison of retention, reinvestment, and sale alternatives.

Grievance 2: Questions about the transaction process

The announced offer was described as unsolicited. The public record available for this paper does not establish whether a formal competitive marketing process was conducted or whether multiple offers were solicited.

Important questions include:

- Was an independent appraisal completed?
- Was a broker or real estate advisory firm engaged?
- Were other qualified purchasers approached?
- Was a competitive bidding process considered?
- Were alternative transaction structures evaluated?
- What due diligence was completed before the agreement was approved?

Our position: The community deserves assurance that the property was sold through a process designed to achieve the best overall charitable and financial outcome.

Grievance 3: Insufficient community participation

The Morrison YMCA is a community institution whose value has been built through years of member participation, philanthropic support, volunteer service, and local engagement. The community deserves to understand how its interests were incorporated into the decision.

Questions include:

- What input was received from Morrison members?
- What role did the Morrison Advisory Board play?
- Were original donors and significant benefactors consulted?
- Were employees and community partners engaged?
- Were community alternatives invited or considered before the agreement became binding?

Our position: Community participation should be meaningful, early, and substantive when decisions permanently alter the delivery of charitable services.

Grievance 4: Uncertainty about the future of YMCA services

The YMCA has committed to continuing core programs after the sale and has identified nearby facilities as potential service locations. However, a commitment to continue programs is not equivalent to a fully developed replacement plan.

The community needs measurable answers regarding:

- Available facility capacity.
- Program schedules and locations.
- Childcare and after-school availability.
- Senior programming.
- Aquatics and swimming instruction.
- Youth sports.
- Summer camp capacity.
- Transportation and accessibility.
- Membership continuity.
- Employee retention and relocation.

Our position: No community should be asked to accept the loss of an established YMCA facility based solely on general assurances of future programming.

Grievance 5: Long-term stewardship of charitable resources

The YMCA is a charitable nonprofit organization with a public-serving mission. Its real estate decisions should be evaluated in the context of that mission. The central stewardship question is whether the financial benefits of selling Morrison outweigh the long-term community benefits and service capacity that could be preserved through continued ownership or an alternative arrangement.

Our position: The best financial transaction is not necessarily the best charitable outcome.

Grievance 6: Unresolved questions about property history and restrictions

Questions have been raised about historical deed restrictions and the property's intended use. The YMCA has stated that it retained Robinson Bradshaw to review the deed history

and that the firm's conclusion was that the Morrison property is not subject to the use restrictions in the 1998 deed.

This position should be acknowledged fairly. Nevertheless, the complete recorded deed history, legal analysis, and relevant title documents should be available for independent examination.

Our position: Property history and legal restrictions should be resolved through documentary evidence and qualified independent review, not speculation.

WHAT ARE THE ARGUMENTS AGAINST THE SALE?

Argument #1: The financial case has not been sufficiently demonstrated to the public

The YMCA's financial challenges are documented. The 2024 deficit is significant. The organization's capital needs are substantial. But an organization-wide financial problem does not automatically establish that the Morrison property is the appropriate asset to liquidate. A responsible decision requires a comparative financial model.

That model should show:

1. The financial consequences of selling Morrison.
2. The financial consequences of retaining Morrison.
3. The cost of necessary improvements.
4. Potential revenue from expanded programming.
5. Potential partnership and philanthropic contributions.
6. The financial impact of alternative financing.
7. The long-term value of the property and its community services.

Without this comparison, the public cannot independently determine whether the sale represents the best available option.

Argument #2: A valuable community asset is being permanently displaced

A building can be replaced. A community institution is much harder to replace. Morrison has accumulated relationships, institutional knowledge, program participation, volunteer engagement, and community trust over decades. Moving programs elsewhere may preserve selected services, but it does not automatically preserve the existing community environment.

Argument #3: Regional investment should not come at the expense of an inadequately evaluated local alternative

The YMCA has explained that the sale will support investments across its broader network. Those investments may benefit many communities.

However, the public deserves to know why those improvements require the permanent loss of Morrison rather than a combination of financing, fundraising, partnerships, facility optimization, and targeted asset management. The organization should demonstrate that it has considered the full range of available alternatives.

Argument #4: The transaction creates an accountability obligation

Once the property is sold, the community loses the opportunity to retain the existing facility under YMCA ownership. That makes the quality of the decision-making process especially important. The more permanent the consequence, the stronger the justification and accountability should be.

WHAT ARE THE PRINCIPLES AT STAKE IN THIS FIGHT TO STOP THE SALE?

Our position is grounded in five principles.

Principle 1: The YMCA mission must remain the governing consideration.

Financial sustainability is essential, but it is a means to support the charitable mission, not an end in itself.

Principle 2: Community assets deserve exceptional stewardship.

Property acquired, developed, maintained, or supported in furtherance of a charitable mission should be evaluated according to its full community value.

Principle 3: Transparency strengthens institutional trust.

Providing meaningful financial and governance information is not an admission of wrongdoing. It is responsible nonprofit leadership.

Principle 4: Alternatives should be evaluated before irreversible decisions are completed.

A sale should not be treated as the only viable answer until credible alternatives have been fairly considered.

Principle 5: The community should have a meaningful voice.

Members, donors, families, employees, and community partners are important stakeholders in the future of a community-serving institution.

WHAT IS THE ACTION PLAN RIGHT NOW?

Our coalition is following this framework as a guide to organize proactive actions and activities to reconcile the facts, force a good faith reconsideration of the transaction and submit a viable alternative policy decision to the YMCA of Greater Charlotte Board.

Action 1: Commission an independent transaction review

Engage an independent financial and real estate advisory firm to evaluate:

- The $42.5 million transaction price.
- Independent fair market value.
- Comparable property transactions.
- The process used to identify the buyer.
- Alternative purchasers and offers.
- Transaction expenses and net proceeds.
- The financial impact of retaining the property.

We seek to make the review available to appropriate stakeholders, subject to legitimate confidentiality requirements.

In addition, we seek the following documents to support a fair, objective fiduciary audit:

- Executed purchase and sale agreement and relevant amendments.
- Independent appraisal and valuation materials.
- Board resolutions and transaction approval records.
- Relevant board conflict-of-interest disclosures.
- Transaction due diligence and financial analyses.
- Morrison-specific operating statements and capital expenditure projections.
- Detailed allocation plan for sale proceeds.
- Robinson Bradshaw deed and title review.
- Recorded historical deeds and relevant title documents.
- Morrison donor and capital campaign history.
- Detailed post-sale program relocation and service commitments.

These materials are necessary to provide the community with an evidence-informed advocacy position to mobilize around.

Action 2: Develop a Morrison retention and reinvestment plan

Preparing an alternative business plan that evaluates continued operation of the Morrison YMCA. It will include:

- Capital improvement requirements.
- Operating projections.
- Membership and program growth opportunities.
- Potential facility partnerships.

- Philanthropic fundraising.
- Sponsorships and naming opportunities.
- Financing alternatives.
- Potential operational efficiencies.

This analysis will compare the financial and community outcomes of retention against the sale.

Action 3: Establish a community-supported acquisition or partnership option

Exploring the creation of a qualified nonprofit entity, community foundation, charitable consortium, or other mission-aligned organization to pursue a solution that retains community-serving use. Potential structures include:

- A community-supported acquisition.
- A long-term lease.
- A joint operating partnership.
- A sale-and-leaseback arrangement.
- A charitable real estate partnership.
- A dedicated Morrison preservation fund.

These are options being crafted and submitted for legal and financial feasibility.

Action 4: Create enforceable South Charlotte service commitments

If the sale cannot be stopped, the community is demanding a formal South Charlotte service continuity agreement be defined and disclosed. The agreement should specify:

- Programs to be maintained.
- Geographic accessibility standards.
- Facility capacity.
- Childcare commitments.
- Senior programming.
- Youth development.
- Aquatics and swim instruction.
- Summer camp opportunities.
- Funding commitments.
- Public reporting requirements.

Commitments should include measurable milestones and accountability.

Action 5: Establish an independent community advisory process

The coalition seeks to create a representative advisory group including:

- Morrison members.
- Longtime donors.
- Community leaders.
- Parents and families.

- Senior participants.
- YMCA staff and volunteers.
- Local nonprofit partners.

The group should have access to relevant information and a defined role in evaluating alternatives and monitoring the transition regardless of whether the sale is enforced or reversed. Lesson learned is that abdication of proactive oversight has resulted in the current crisis.

WHAT DOES THE COMMUNITY REQUEST OF THE YMCA BOARD RIGHT NOW?

We respectfully request that the YMCA of Greater Charlotte Board of Directors:

1. Publish a comprehensive explanation of the financial rationale for the Morrison sale.
2. Disclose whether an independent appraisal was completed and summarize its conclusions.
3. Explain the transaction evaluation and purchaser selection process.
4. Publish a transaction-specific financial analysis comparing sale and retention.
5. Explain how net proceeds will be allocated and monitored.
6. Provide a detailed plan for continued YMCA services in Ballantyne and South Charlotte.
7. Disclose the scope and conclusions of the independent property and deed review.
8. Establish a meaningful community consultation process.
9. Evaluate a credible community-supported alternative to the sale.
10. Provide regular public progress reports through the anticipated closing.

We further request that elected officials and appropriate civic institutions encourage transparency, accountability, and the preservation of community-serving resources.

These requests are not allegations of illegality. They are reasonable expectations for a significant nonprofit property transaction with substantial community consequences.

WHY SHOULD COMMUNITY STAKEHOLDERS CARE ABOUT THIS ISSUE?

1. Donors and philanthropic supporters

Donors invest in charitable missions, community impact, and the long-term sustainability of institutions. They have a legitimate interest in understanding how important charitable resources are being managed and whether alternative approaches could better preserve community benefit.

2. Elected officials

The Morrison YMCA serves families in a rapidly growing area of South Charlotte. Its future has implications for youth development, recreation, family services, public health, and community infrastructure. Elected officials should encourage transparent decision-making and examine whether public-private partnerships or other community-serving alternatives could help address the situation.

3. Community and civic leaders

The issue extends beyond individual memberships. It concerns the availability of accessible recreational and social infrastructure in a growing community. The preservation of community institutions is a legitimate civic priority.

4. YMCA leadership and supporters

The goal should be to strengthen the YMCA's long-term financial health while preserving the trust and relationships that make its mission possible. A transparent review can improve confidence even when stakeholders disagree about the ultimate outcome.

CONCLUSION: A BETTER PATH FORWARD

The Morrison Family YMCA represents decades of community investment, relationships, service, and shared experience. The YMCA of Greater Charlotte faces legitimate financial and operational challenges. Its need to modernize facilities and strengthen its financial position is understandable.

But the question before the community is not whether the YMCA needs a stronger financial future. It is whether selling Morrison is the best way to achieve that future.

That question deserves a complete answer.

A $42.5 million transaction is significant. The permanent loss of an established community facility is significant. The financial needs of the broader YMCA organization are significant.

All three considerations must be evaluated together.

We believe there is a responsibility to examine alternatives before accepting the permanent loss of a community institution.

We believe there is an opportunity to bring together donors, business leaders, elected officials, residents, and philanthropic partners to develop a constructive solution.

And we believe that the YMCA's mission is best served when financial stewardship and community stewardship reinforce one another.

Morrison should not be lost simply because a sale represents an immediate financial opportunity. The community deserves to know that every reasonable alternative has been considered, every important stakeholder has been heard, and the long-term charitable consequences have been fully evaluated.

The objective is straightforward:

Preserve community value. Protect the YMCA mission. Strengthen institutional accountability. Build a sustainable future for Morrison and the communities it serves.