

## James O'S Morton: Life as a Nonprofit CEO

The day-to-day responsibilities for nonprofit chief executive officers (CEOs) can vary greatly depending on the nonprofit organization's size, geographic reach, and mission, among other factors. As a result, it can be difficult for senior leaders who aspire to become nonprofit CEOs to fully understand the scope of the role and the challenges they might face when they first move into the top job. To help would-be CEOs gain insight in those areas, Bridgespan Partner Kathleen Yazbak talked with James O'S Morton, president and CEO of the YMCA of Greater Springfield. The organization is one of the largest providers of childcare, before and after-school programming, housing, and wellness programs in Western Massachusetts. Previously, Morton served as the executive director of the Massachusetts Career Development Institute, Inc. (MCDI), where he restored MCDI's reputation for quality programming, fiscal discipline, and advocacy for those in need of employment, housing, and literacy services. Prior to MCDI, Morton was a law and history teacher at the High School of Commerce and was a practicing attorney for more than 18 years. Morton is a graduate of the University of Wisconsin and Northeastern University School of Law.

While Morton's story is uniquely his own, his experiences can help senior leaders think about the questions they should ask to get a better understanding of the nonprofit CEO role in general and any specific CEO roles at nonprofit organizations in which they are interested.

### Preparing for the role

James Morton was not a stranger to the YMCA of Greater Springfield when he was asked in 2006 to consider becoming its president and CEO. He had worked for five years on the organization's strategic planning committee and had played a key role in the success of its Youth and Government Program, which was created to help combat the 49-percent dropout rate in Springfield's public schools. (In fact, 95 percent of the children who have participated in the program for two years or more have not only graduated from high school but have gone on to college.) But when he was asked to apply for the CEO job, Morton was not sure the Springfield organization, with its focus primarily on swim, gym, and camp programs, was the right fit. "To be honest, I didn't see the congruence [with my experiences at MCDI]," he said. "[At MCDI] I was in the community, helping individuals transform themselves one person at a time from poverty to employability—I didn't see how that connected with what I might be doing at the Y."

Morton decided to do some research. He went on the Internet and researched other YMCAs across the country. He discovered that a number of them were successfully running workforce development training

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programs, community-based health initiatives, housing developments, and other innovative programs. Some of the organizations had formed partnerships with local Boys and Girls Clubs. Morton read speeches made by the YMCA's national president to get a sense of how he viewed the organization's mission. Morton then spoke to people within the Springfield community about the work of the local YMCA and what they thought of that work. He asked people he respected—including Springfield's mayor and the leaders of several community-based organizations—if they thought the move from MCDI to the YMCA was right for him and whether they thought he could make a difference at the Y. He studied the Springfield YMCA's mission statement and its annual nonprofit filing with the state. "This was all before I made the decision to apply," Morton said. As a result of his research, Morton concluded that the organization's mission could be much broader than just swim, gym, and camp, and that the CEO position was the right fit with his skills and experiences. It also tied in perfectly with his passion for working with children. "I love kids," Morton said. "That is my passion, so that work comes easy for me." He was hired as CEO in 2006.

### **Transitioning into the role**

During his first days on the job, Morton began by implementing the strategies contained in *The First 90 Days: Critical Success Strategies for New Leaders at All Levels*, by business consultant Michael Watkins. "These are primarily very basic things: sit, listen, learn, introduce yourself to your new staff, interview your new staff to get to know who they are—and not only who they are in terms of their professional aspirations and goals and experiences, but get to know who they are on a personal level, what their interests are, hobbies, what kinds of things are important to them, and where they see themselves five to 10 years down the road," Morton said.

Morton began compiling a list of what he considered to be the major challenges of the organization and its major successes, based both on what he had observed coming into the organization and during his first few months as CEO. "The purpose of the list was, at some point, I was going to share with the staff what I had observed, and I wanted to be able to recognize the good things that were going on as well as the challenges," Morton said. Morton also made it a point in his early days to get to know as many of the 24 members of the organization's board as he could, asking them questions like: "What are you all about, why are you committed to the YMCA, why is the work of the YMCA important to you, what things have you done to advance the mission of the Y, and what do you anticipate your future role with the YMCA being?"

## Deviating from the plan

As *The First 90 Days* suggested, Morton had planned to make few major changes right away. This was particularly important because he joined the organization from the for-profit sector and was sensitive about the need to build trust and credibility with his staff. But he quickly realized that he would have to adjust the book's game plan to fit the situation at the YMCA. And so, in one of Morton's first acts as CEO, he changed the reporting structure to give himself seven direct reports instead of just the two that existed under his predecessor. "I did that primarily to make certain that I was getting the information firsthand so that I could learn about the organization as quickly as possible," Morton said. He made the change with the expectation that at some point in the future, he might change those reporting assignments back to the original format, though he remains with seven direct reports today.

Morton's biggest deviation from *The First 90 Days* strategy was to truncate his transition period from 90 days to 60. The reason was that he discovered a wide divide between the organization's branch in downtown Springfield and its newer branch in suburban Wilbraham. Springfield is ranked sixth in the nation for children living in poverty in cities of 65,000 or more while Wilbraham is one of the wealthiest communities in Massachusetts. Morton said the gap between the branches became apparent early in his tenure when he attended a hockey game for the local professional hockey team, where the YMCA was displaying information about its two branches. The Wilbraham branch had a shiny, glossy brochure filled with professional graphics and photos. The downtown Springfield branch had a shabby-looking, photocopied program guide. "It was as if we had two silos going on, two separate YMCA organizations, as opposed to one organization," Morton said.

Morton decided that if he left the silos in place for 90 days, it would look as if he supported them. So, after just 60 days, he began to talk with staff and the board about the organization as one association, not as two separate branches. He began talking about ways to develop relationships between the two branches. For example, he exchanged and shared programs between the two branches, and began having operation-team meetings at both locations. While his office is in the downtown branch, Morton made an ongoing commitment to spend one day a week at the suburban branch. The members of his leadership team did the same.

Morton made several structural changes to support this cultural shift. He brought the second-in-charge from the suburban branch and appointed her as the head of the urban branch. "I knew she had incredible skills and abilities, and she served the urban branch quite well," he said. He also appointed one director to oversee the Child Development Centers in both branches, replacing the old system of having one suburban director and one urban director. He then did the same for the before and after-school programs, appointing one association-wide director for each program. "Those kind of structural changes,

organizational changes, support the idea that we are one association that works together in unison to promote our mission,” Morton said.

### **Working with a predecessor**

Morton said his transition into his new role was helped tremendously by the fact that the previous CEO remained on board for Morton’s first three weeks. During the transition, the outgoing CEO traveled with Morton and introduced him to the board members and to individuals in the community who had historically supported the YMCA with either their time, talent, or their treasure.

Morton said he learned an important lesson from seeing the positive effect that the former CEO’s soft-spoken manner had on members of the community. “I can be really aggressive,” Morton said. “But I did have to watch and learn from him. I think that it’s better, in many regards, to tread softly in some areas.”

### **Engaging the board**

One of Morton’s goals was to get the board more deeply involved in the creation and execution of the organization’s strategy. (Morton had been part of the strategic planning committee prior to becoming the CEO; however, during a meeting he suggested the process would best be continued with the new CEO in place. The committee agreed, and resumed the process after he was hired.) The YMCA’s new strategic plan identified five goals for the organization, so Morton created one new board committee for each goal and charged them with ensuring those goals are met. He cut the number of board meetings from 12 to eight and shortened the length of full board meetings by asking the committees to do their work at their own, smaller meetings and then simply report back to the whole body at the full meetings. “We have not wanted our board meetings to be reporting meetings,” Morton said. “We’ve wanted our board meetings to be working meetings so that we can get our board members fully engaged in the work that we’re doing and get their input, their expertise, their knowledge, and their opinions as we formulate our strategies to do the work.”

While Morton serves on the development committee, it is the committee chair who leads the effort to ensure that board members receive a thorough orientation and that they are clear about their responsibilities. Another board member is in charge of calling board members who miss meetings and bringing them up to speed. Morton said his board chairman has been an important partner in the effort to increase the board’s engagement. For example, the chairman joined the YMCA, so he is on site every day working out in the facilities and seeing first-hand the issues the organization faces. “He’s knowledgeable and he is invested and I really couldn’t have a better board chair,” Morton said.

## **Juggling day-to-day responsibilities**

Within the YMCA of Greater Springfield, Morton manages the leadership of the organization's wide array of programs, which include childcare, before and after-school programs, 104 units of affordable housing, a health and wellness center, a teen fit center, a pool and aquatics program, a Montessori school, three drop-in centers that operate in the evenings, and three summer camps. "My job is to make sure that our work in all those regards is coordinated," Morton said.

In addition to managing staff and overseeing the YMCA's internal operations and programs, Morton is the organization's public face throughout the 11 different cities and towns in its service area. He attends community-based meetings to get the word out that the YMCA is committed to using its resources to improving the community's quality of life and spends about 40 percent of his time on fundraising-related activities in order to meet the demand for the YMCA's services among the most disadvantaged members of its community. Morton believes in building relationships before requesting financial support from potential contributors, so one of his toughest challenges as CEO is when an urgent need requires him to ask for financial support from someone with whom he has not yet cultivated a relationship. "I always feel uncomfortable in these situations and will frequently put the issue on the table as I ask for support," he said. "Fortunately, I live in a very supportive and generous community, and our contributors have confidence that our services are making a difference in the communities we serve."

Since he came from outside the YMCA organization, Morton said it is important for him to be involved not just in his local YMCA, but also with the YMCA organization regionally, statewide, and nationally. He spends time building collaborative relationships between the YMCA, the local municipal government, the public schools, the local hospitals, and other community-based organizations. "I am constantly trying to find ways to work in collaboration or unison with other organizations, so that we can do more work with fewer resources," he said.

## **Thinking strategically**

Despite the constant demands on his time, Morton said he manages to fit strategic thinking into his daily routine. "Fortunately, I have a strategic plan that was just completed and adopted by our board," Morton said. "Because we created all our board committees so that they flow from the strategic plan and because the strategic plan is on every agenda of every meeting that we hold, it's easy to keep strategic thinking at the forefront of my mind at all times." Before he commits to anything, Morton first ensures it connects directly to the plan. "If it isn't a part of the strategic plan, then I don't move forward with it," he said. For example, Morton turned down a request for the Y to run English as a second language (ESL) classes and

instead offered to lease space at the Y to someone willing to teach ESL classes. “I’m trying to be very intentional in the work that we do,” Morton said.

While staying focused on the organization’s overall strategic goals, Morton must make sure his senior leadership team has the flexibility to adapt to the changing needs of the community. The team continuously analyzes data gathered from the YMCA’s programs and uses that data to develop new initiatives. “I am surrounded by a very good staff who can get the job done,” Morton said. “But I already have staff members who are wearing nine hats. And I’m trying to add on another two or three, because that’s what the data tells us we need to do.”

Morton plans to use this year’s evaluation process to help his leadership team manage that juggling act. Each team member will identify nine major tasks that are a part of his or her work. With Morton, team members will unpack the responsibilities involved in each of those tasks and decide which are the six most important tasks. They will then identify other staffers who can take on the three least important tasks. “I need to lighten their loads, because otherwise I’m going to burn them out,” Morton said. “I need them to take on some really challenging initiatives that keep presenting themselves to us. If we’re really going to do this work well, we need to be able to be flexible. And if folks are overwhelmed with the challenges of their current positions, they’re not going to be flexible. They’re not going to be willing to take on those new tasks. So, that’s my challenge.”

### **Balancing work and life**

The Y’s motto is “mind, body, and spirit all in balance.” Morton said he encourages his senior staff to try to maintain a healthy work/life balance. The organization is flexible about senior managers taking time off for family commitments, for example encouraging people to take an afternoon off to go to a child’s football game or other activity. In addition, everyone is required to use his or her annual vacation time. “It’s important to have a break from the work,” Morton said. “I know they work more than enough hours other times to compensate for it.”

With his many responsibilities and the large role that the Y plays in the community, Morton typically works 60 to 65 hours a week on the job—which includes time spent at community meetings, weekend events, and yoga classes he teaches two mornings a week at the Y. Ironically, Morton said that while he encourages his staff members to take time off or to leave the office at a reasonable time, he often has trouble doing the same.

Morton said his passion for the YMCA’s mission makes all the hard work worthwhile. “Nonprofit work is, at best, difficult, especially during challenging financial times, so one needs the resilience and energy that

comes from being passionate to fuel one's work. I love my work and believe our organization is improving and saving lives each and every day. “

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