

**Interviewer:**

For the purposes of this taping session, what is your name, and how did you first find out about Junior Achievement?

**Marty Lee:**

My name is Marty Lee. I was in graduate school at Emory University in Atlanta, Georgia, and I had almost completed. I worked two part-time jobs, one for the YMCA coaching football, and one for Sears in their regional credit center. The head of the regional credit center for the whole 12-state area, I believe it was South, was on the board of directors of Junior Achievement. I was asked to consider a management position with Sears. After a long debate about it, I just didn't feel Sears was the right fit for me because it was just too big of an organization. The thing I remember most is that we were in a room that was probably 100 yards long and 50 yards wide, and it was filled with all these desks. We handled approval of credit for the whole...all these states would call in for credit on people's accounts. Whenever management people would walk through, I would watch employees cower, and I would be absolutely stunned at this reaction.

So, I felt like Sears wasn't a good fit for me. Anyway, in talking to this JA board member, he mentioned that Junior Achievement may have an opening. I didn't know anything about JA, so I didn't think very much about it. Soon afterwards, I decided I needed to look for a new job. So, I contacted an outplacement search firm. After looking at my résumé and what I was doing, they said, "Have you heard of this organization Junior Achievement?" I said "Yes, but I don't know anything about it." The next thing I know, they got me an appointment with their regional office in Atlanta. Not the local office, the regional office. I went and interviewed with Marvin Butts, who was the regional vice president. This was around January 1970. After the interview, Marvin said, "You would be a great candidate for what JA then called executive director." That title was subsequently changed to president.

Marvin told me there are some qualifiers that you don't meet. - They actually had four qualifiers. They only told me about two of them. The other two I surmised, which I think are pretty accurate. One I met. Two I met. One, I was male. Two, I had at least a BA or BS degree. The two that I didn't meet that they didn't talk about was I was white, and I wasn't married. You had to be married. Another qualifier I subsequently learned and met was you had to be 25 years old, because at that time for the whole night-time program, being married was seen as being stable. At 25, you probably are old enough to work with kids, that kind of stuff. Marvin said, "Look, they may have an opening at the local office, and I think you'd be great to start there if you'd be interested." I said sure.

So, I went and interviewed with Allen Kirtley, who was president or executive director of the Atlanta office. At the time, there was Allen, one program director, and two secretaries. Allen was about to dismiss the program director who had a drinking problem. Allen said that the position wasn't open, but he would like to keep me in mind. I said okay. A month or so later, Allen called me and said, "I made a change. Would you still be interested?" I said sure. So, I ended up interviewing with three board members. I went through a series of about four interviews in two

months. Finally, the job was offered to me. I started in April of 1970 as the Program Director for Junior Achievement of Greater Atlanta. That's how I got into JA.

**Interviewer:**

Wow, that's great, Marty. Well, I know you've held a lot of positions since then. If you could just list those for us, without going into detail yet, because you'll have an opportunity to go into detail on each one.

**Marty Lee:**

My next position was the Executive Director of Jackson, Mississippi. I was there for almost five years. Then I was hired by the national office as the Regional Director of Project Business, and I was sent back to Atlanta. I was in that office for a year. Then I was transferred to the St. Louis regional office as the Regional Director of Project Business there in the Midwest. I left JA for three years. I came back as President of JA Orlando. I was there for almost two years. Moved to New York. Became Executive Vice President of JA of New York. I was there for about four years. Then I was re-hired by the national office as the Vice President of Training in Stamford. We moved a year later to Colorado Springs. I was named Vice President of Personnel. Then I was named Senior Vice President of Human Resources. I left again in 1995 for a year. I returned in '96, again in the same position as Senior VP of Human Resources. In 1998, I was named Executive Vice President and Chief Operating Officer.

**Interviewer:**

Wow, that is quite a career with Junior Achievement. All right, so, going back to the early beginnings when you were in Atlanta as the program director, how many programs did JA have at that time?

**Marty Lee:**

One.

**Interviewer:**

Still just the high school company program.

**Marty Lee:**

Company program.

**Interviewer:**

Tell us what it was like being the program director at that time.

**Marty Lee:**

Atlanta had five—we called them centers. We had two buildings that we owned and one main office in the building out South, and we had three other rental spaces. On Monday about noon, I would take off to deliver the program materials to all the centers. I would end up at one of the centers by 6 o'clock at night, and I would stay at that center that night. I had a very good mentor. Allen Kirtley was an excellent teacher. But we were the kind of organization that we did everything. I remember one time in one of the centers a toilet broke. So, Allen grabs me, and we go over to replace a toilet on Monday morning, and we were just finishing up as the kids were

walking in that night. I have very fond memories of doing that, along with the great range of experience I learned. In two and a half years we grew the largest program in the history of Atlanta JA. I had just a very good early experience with JA.

**Interviewer:**

Wonderful, and you speak highly of Allen Kirtley. Tell us about your relationship with him and what kind of a mentor he was and what he brought to Junior Achievement.

**Marty Lee:**

Well, I think the strength Allen brought was he was not only a good manager of people, but he was a good manager of the business. He understood it. He clearly knew how to manage a board of directors. He was very good at raising money. Very good at expense control, and he was the kind of manager who didn't overshadow me. You know, he was very supportive of what I did. I made sure I communicated with him.

He took me to conferences. That was really one of the best things that happened to me. He sent me to training early. He took me with him to the National Staff Conference the first year I was there. He made sure I went to all of the regional conferences. He kept adding on more responsibility as he saw my progress. He was always thinking about JA, and he never talked negatively about the national headquarters or the regional office. He modeled for me that the relationship between area offices and national should be a good relationship and not a confrontational one, which I've learned, you know, is not always true in other offices. He told me when he hired me, "Marty, in two years, I expect you to leave this job. You have two years to prepare yourself, and then you have to take on and become the president of a franchise."

I said yes to that, although, quite honestly, in the back of my mind, I could not imagine leaving Atlanta. One day, he called me into his office. I'd been there over two years, between two and about two and a half years. He called me in, and he said, Marty, I want to talk to you about an opening in Jackson, Mississippi, and we'd like you to consider it. I immediately said no, and to his credit, he said, no, wait just a minute.

He said, "Don't say no. Don't close it down. Let's just talk about it." He said, "Here's the situation. As I understand it, they fired the person there. It's got a lot of potential. Good board. They've got their own building. Why don't you just go look at it and then make your decision?" I didn't know at the time that I was the only candidate. Actually, I did know it at the time, but the board had decided to close the franchise down. Marvin Butts had talked them into staying open if they could get a good candidate in there. I went in without that knowledge and I interviewed. I remember what changed my mind was riding in a cab from the airport to the hotel. The airport's way outside of Jackson. We came around a curve, and all of a sudden, there were high-rise buildings. I don't know what I thought was in Jackson, Mississippi, but it certainly wasn't high-rise buildings.

So, immediately, I was okay. Okay, this is okay, and so I interviewed. They offered me the job on the spot, I accepted, and that's how it worked. From that point on, Allen has been a mentor because he moved onto the regional office and moved onto the national office. He's always taken

a very special interest in my success. I've always felt I can call him and talk to him about anything.

**Interviewer:**

That's great. All right, well, tell us, while you were in Atlanta, did you go to NAJAC?

**Marty Lee:**

Oh, yes.

**Interviewer:**

Okay, so some of your kids got to go to NAJAC?

**Marty Lee:**

Oh, yeah, we went there for competitions. We drove a bus, and we would pick up kids. We usually picked up kids in Chattanooga, Tennessee. Sometimes we'd take the bus to Georgia, so Augusta kids would come with us. It was a two-day bus trip out to Indiana University. NAJAC was a great experience. I did it for two years, prepping the kids for various competitions. It was really a wonderful opportunity to watch the kids. I never became a staff member there. It's not something I really felt I wanted to do. When I went to Jackson, I had other staff escort our kids. I might fly out for a day or two, but I thought NAJAC was one of our best events.

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**Interviewer:**

Paint us a picture.

**Marty Lee:**

From a staff perspective it was for the kids, something for them to strive for, and competition creates and breeds the best kids to come out. More importantly, the energy of the kids who came back proved infectious among the other kids that you had. They were selling it, so other kids got excited about it. I could also draw on them to serve as speakers for PR purposes. You got to know them pretty well, certainly better than you can in our current in-school programs model. NAJAC was just a great tool for the organization. It was very expensive relative to what you have in your budget. You always try to get local sponsors to pay for it. It's amazing the number of people you run into that their recollection of JA is NAJAC. You know, it's an experience that they never forget, and everyone who goes has their stories.

JA held regional conferences, too, but the big job at the regional conferences was security, walking the halls at night, you know, trying to keep the boys and girls separated. I lost a lot of sleep trying to do that, but it was still wonderful. Most kids were pretty good. They really never created problems for you. Every once in a while, you could have one, but not too often.

**Interviewer:**

That's great. Okay, and so you had a center in Atlanta?

**Marty Lee:**

Five.

**Interviewer:**

Five centers. Tell us about those.

**Marty Lee:**

They were located strategically because Atlanta's a pretty big city, so the job of recruiting students was the most challenging. We had over 100 high schools to recruit in. You would target a high school to go to a certain center. In recruiting the adult advisors, it was predicated on where their businesses were located. In the main center we had 10 bays four nights a week. You could have 40 companies in that main bay. The one in Buckhead had seven bays. The most you could have there was 28 companies. The South Center had 10, so you could have 40 there, and the one up in Marietta only had four, so 16 was the most you could have there. We would run between 100 and 200 JA companies a year. It got close to 200 by the time I was leaving, with a range of 2,000 and 3,000 students. We had a lot of applications. I think we had between 10,000 and 20,000 applications a year.

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**Interviewer:**

So, you turned a lot of kids away then?

**Marty Lee:**

We did for some centers. Actually, the problem is that only a certain percent of them joined anyway, but you don't know which ones. What happens is that you have to make decisions about which kids you pick. I would go through every application, and first of all, it was what center they wanted, what night they wanted. You have to break the applications down into all these factors, and then you would make some judgments. Sometimes you could make judgments by their penmanship. Sometimes you make judgments to try to determine how sincere they were, because once you invite them, if another kid is not invited, they won't come. It's just an educated-guess process. Our goal was to have at least 20 students show up first night for every company.

Some kids couldn't come on the first night, so they'd come the second week, third week. I'd assemble packets of about 100 applications to distribute to each advisor team. Some JA companies would get 50% show up the first weeks, and some would only get 20%. The application response rate depended primarily on how aggressively the advisors would contact those kids. We gave them sample invitation letters to write to the kids and a sample telephone script to use as follow-up. Advisors who were good at making phone calls had their kids show up. So that was how it worked.

**Interviewer:**

Very good. All right, then moving on, you went right up to Executive Director in Jackson, Mississippi?

**Marty Lee:**

Yeah.

**Interviewer:**

And what did you have to do in that position?

**Marty Lee:**

Well, when I got there, they did have their own building. This was in the early mid '70s, about 1972. In the South, segregation was a very difficult time. Forced busing had become an issue, and Jackson, in particular, was one of the sites. When I arrived, they had just gone through two years of forced busing. So, the center that was built was one of the premier nice centers that, early on in Jackson, had been around about 20 years by the time I got there. JA Jackson had built their own building and it was paid for. It was a nice building, but it was located in what I would call a challenged part of downtown. That area had become a primarily African-American community, which is not bad in itself, but in a time when the tension was so high, it was a challenge. That was one issue.

The second issue was the board was down to 11 people. Third, they had no money. I got there in February of '72. They already had the fundraising campaign raising at that time about \$30,000 a year, and they would spend it all. This \$30,000 I was to raise was supposed to be for the next program year. So, they'd already raised all the money for the current program year, spent that, and also for the next year. We were a year and a half behind in revenue.

When I got there, there were supposed to be 200 kids in the program; I found 11. So, there was one company and 11 kids. The regional office wanted me to try to get some more companies going, which is very hard to do after the school year has started. I negotiated, saying let me finish this one, and I'll get it ready for next year. The regional office had a fundraising expert who came in to work with me for two days.

Allen had always managed the fundraising in Atlanta, so the only thing I had never done was fundraising. So, this specialist showed me the manual and detailed how to plan a campaign. Two things stick in my mind. First, he and I put together a very good calendar, timeline, major gifts targeting, general divisions, the leadership, how you had to recruit, train...all that kind of stuff. But the biggest experience that helped me the most was when he stopped at one point and said, you know, "You've got to change your language." He said, "You keep saying *they*. There's no more they. It's we. You're here, and you're part of it now. So, this is not them anymore. It's you." I got it, and that was a really pretty significant shift for me to embrace and do that.

My board chair was Managing Partner of Pete Norwich. He had to agree to the plan and had to help me go out and recruit. I didn't know anybody in the community to recruit a chairman for the various division heads. He wouldn't return my phone calls, and I had deadlines to meet. I would call, and I would leave a message saying to him, look, I'll be in the office from this time to this time. You know, I got nothing from him. Highly frustrated, I called my regional vice president, Marvin, and was trying to explain that I was at a point that I was ready to leave because this wasn't working. I'd done everything I needed to do, and I didn't know what else to do.

My Regional Vice President said, well, write him a letter, and tell him to call you on a certain day, and I did that, and I sat there and waited, and no phone call. I really was afraid to even call Marvin again, and Marvin said, "Marty, before you do anything else, I want you to sit down with a gentleman called Jimmy Fowler. Jimmy is the guy that founded JA in Jackson. He's still on the

board, and I want you to sit down with him and see if he can help you, and I would recommend you ask him to be chairman of your major gifts.”

That’s the hard gifts. I called and set up an appointment. I went into Jimmy’s office. At the time, he had a lot of businesses, but he was known because he had the Buick dealership. He also owned a big shopping center near town, and he owned a lot of other stuff. I went and sat down with him, and the first thing out of his mouth was, “Marty, you know I’ve been on the board from the beginning. I think it’s time for me to step down.” That was the first thing he said to me, and I will credit what happened in the next minute for my career. Nobody trained me to do this. I don’t know where it came from. I looked at Mr. Fowler, and I said, “Mr. Fowler, you can’t do that. I said, here’s the situation. I need you. You know, I can’t do this without you.” It became powerfully silent. I don’t know how long he didn’t say anything, but finally, he looked at me. He says, “You need help, don’t you?”

I said, yes, sir, and I need you to do this, this, and this, to be the captain of the campaign. I told him what was happening with the board chair. He agreed to do it, and got behind me. We went out and raised a bunch of money quickly, which got us out of debt. I didn’t know what was happening to the board chair. His wife was dying. She had cancer, and when he finally told me about it, he apologized. The irony is that particular chairman is another key to my success. Bill Norton was his name. Bill was the guy who, after he stepped down as chairman, I used him for the next three years to help me recruit key community leaders onto that board. He had the influence, and he did it.

So, that was one issue. The second issue was, at that time, a mass exodus from Jackson public schools. Parents and educators started creating private whites-only schools. The challenge was, how do I get these private schools let me recruit white students to come to centers where there were black kids? I got one of my board members to agree to let me use one of his firm’s facilities to open a center in another part of town. Several private schools allowed me to recruit. I had good success at a parochial school called St. Joseph so we launched a solid first year.

I had 14 JA companies, and opening night an average of 40 kids per company show up. I was ecstatic! But the board member who let me use that facility, when I went to see him to talk about his company, about his advisors, and the space, the first 30 minutes, all he did was blast JA. I mean, he was on the board. He was angry. His advisors were overwhelmed and struggled with melding the black kids with the white kids. I let him vent, and I remember sitting there saying to him, look, you’re right. I told him I can change it. I just need you to give me a chance. So, after thinking about it for a while, he said, okay, I’ll give you one chance to turn this around. I said, okay, here are the conditions. I need you to give me your four best people to serve as advisors, and I need your space. He did that and became one of my biggest allies. The next year we grew to 20 something companies. Things really started to turn around.

About 1974, I went to a regional conference, where Julie Hubbard, who was the National Director of Research and Development, talked about JA exploring an in-classroom curriculum for grades 7 or 8. It wasn’t two weeks later, I get a phone call out of the blue from a teacher, and she said the school board just mandated that schools start creating curriculum around careers. She said, “I know a little bit about JA. Do you have anything?” I said I know JA is working on

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that type of program. Let me investigate and get back to you. So, I call Julie to report this inquiry. Julie said she'd like to come down to Jackson to talk about this opportunity. I said great. So, she came down. She told me she had a program concept called Project Business (PB). JA had piloted it the year before as a 30-week program, but that didn't work. The pilot included ten weeks of classwork, ten weeks of field trips, and then the last 10 weeks, they did JA Company. It just didn't work.

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So, would I be willing to pilot a slimmed down Project Business? I talked to the board, but the deal was that Jackson would have to fund it. Julie and Marvin came to Jackson to brief our Executive Committee. Julie was the only one who really knew this new program. Julie scratched her eye the night before and couldn't come to the meeting. So, I'm panicking, but we get there, and Marvin does an okay job. The committee endorsed running a pilot if the funding could be secured. That afternoon I got a call from my IBM contact, who said, "Look, I've got the \$1,000. IBM will pay for it." So, Jackson agreed to pilot this in the spring of '74. We had six Project Business classes. I did the first PB training. Julie didn't come down, and all we had was a three-ring binder with six little pamphlets in it. I ran a two-hour training with six consultants and six teachers.

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The other area that ran a PB pilot was Orlando, Florida with five classes. We started out with six classes. Two of my consultants, Bill Costello from Pete Norwich, and another who was in banking, were excellent and created a lot of the early PB curriculum themselves. One of the curriculum components was an exercise with the kids learning about writing a check. The kids loved it and it was a great hit. A huge hit, and so the next year, we ran 20 classes. Then JA announced that they were creating a National Director of Project Business position. I applied for it, but they hired Don Floyd, and Don secured a big grant from Kellogg Foundation. National selected 20 areas to offer PB and provided funding to hire program directors. Jackson got \$40,000.

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You had to hire a director, and you had to run 40 classes the first year. All the training was conducted in Jackson the first few cycles. The real launch of Project Business, if you just trace it, started there in Jackson. The Orlando pilot didn't have the same impact or curriculum substance. I'm not taking credit for it. I'm just saying a lot of the early curriculum came out of Jackson. Certainly, the experiences came out of Jackson. A lot of the parameters on how to create the program started there, and it was a very positive pilot experience.

One thing I remember most emphatically occurred at the 1975 National Staff Conference. Marvin came to me and said, "Look, National wants to make a pitch for Project Business, and we'd like you to make the presentation; promo Project Business as the future of JA." I looked at him and said, you got to be crazy. I said these big area heads would laugh me out of there. I'm just a little guy down in Jackson. Why the hell would they listen to me? But Marvin got me to stay. He said, "Marty, somebody's got to do it, and so what if they laugh at you? So what?" So, I agreed to do it, and I talked about our pilot experience. I flat out said that this is Junior Achievement's new future. Suggesting going into classrooms is JA's new future drew a lot of laughs. But it was from the guys who'd been around forever. This was not a very comfortable position to be in, but it didn't really hurt me over time. And, after my second year in Jackson,

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things started really working. I knew we had to get out of our building and encouraged the board to consider a new location.

Jimmy Fowler started personally looking for a site for us. We had a buyer for our building, and they wanted to build before we were ready to move out. So, we sold it to them, and found an old A&P grocery store that we took over. The A&P had this high ceiling, no air conditioning, very little heat. We were in it for two years and made it work. In the meantime, Jimmy Fowler takes the lead on finding a building. He called one day and he said let's go look at this building. I go to look at it, and it's not a bad building. It'd take some renovation, but they wanted, like, \$150,000, \$200,000 dollars for it, and Mr. Fowler said, that's too expensive for JA. So, we walked out. Less than a year later, we are exploring building our own building. We are now looking at a million-dollar facility, and Fowler's running the campaign to fund it.

In 1976, we move into a pretty much Taj Mahal JA facility in Jackson. Now, there's two anecdotes on how we got there. The first one is we got the land. Great, right downtown on the interstate. I mean, perfect. All the intersections come to it. It was by a river levy with a 100-year floodplain, but it never flooded there. So, everybody, don't even think about it. Second, we knew that the building itself, construction-wise, was going to cost around \$600,000 and we hadn't raised enough money. We probably had \$300,000 to \$400,000, somewhere along there. I was not willing or not wanting to start construction until we had all the money, but Mr. Fowler said, "You know, we have to get going on this." I was scared to death, so I called Marvin. I told Marvin that we don't have all the money. Marvin said, "If Mr. Fowler tells you he's going to raise the money, you don't worry about it. It's not your concern." So, we started construction. It was scheduled to be finished before the program started in September 1976, but it wasn't quite done. We did have enough finished so we were able to open.

At the subsequent grand opening, the Vice Chairman of General Motors was to be the keynote speaker. A week before the Vice Chairman arrived, I had a guy come in from General Motors to spend a week making sure everything was being set-up right. About two days before the opening, another three people joined him. I had a whole crew of General Motors people in my building, making sure this thing was going right.

The weather forecast was not favorable for that day. We were going to do it outside, but I had the contingency to come in. So, the day arrived. Cloudy, overcast, but the rain held off. The Vice Chairman arrived with two aircraft. They had 13 Cadillacs to pick up this entourage and deliver them to the building. It's like the President of the United States. They had to have a special place to bring you so they could walk straight in, but I'm not out there. I'm still in the building because of the event going on. Marvin comes rushing up to me and says, look, something's going on in Detroit. The Vice Chairman needs to have a conference call with Detroit. Is there space? I said, yeah, I have a conference room. So, they put him in a conference room, and the ceremony went off all right. Everything got handled, and then everybody left town.

I do remember briefly talking to one of the front men from GM. I said, what kind of life is this, that he has to be scheduled all the time? The GM guy said what happens is when he's picked up in the morning, he has a briefing. It tells him what he's going to do every day, what he's going to do all day long.

But what happened the next day was the most interesting part of my experience. It had been a very stressful time. In my office was a couch, and it came noontime, but I wasn't hungry. I just needed to take a nap. So, instead of lunch, I was going to lie down on my couch and take a nap. Unbeknownst to me, all the other staff leave at the same time. I don't know why they figured to do that, but they did, and I'm asleep on the couch, and the next thing I know is I feel a presence. I open my eyes, and there's Jimmy Fowler. By the way, the building's named after him now. So, there's Jimmy Fowler standing over me looking down, and he says, "You tired?" I came flying up off of that couch. That's a classic story: every time anybody visits Jackson, Jimmy Fowler does the same thing.

It's time for me to move on. Jackson became known as the launching place for careers, because after I left, Ralph Schulz followed. Dale Johnson succeeded Ralph. Rick Murray came after that, and who's there now? Who's in Jackson, Mississippi?

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**Interviewer:**  
Tabereaux?

**Marty Lee:**  
Tom Tabereaux. So, it has a history of people going through there because the board is so strong. They're such a committed organization. It developed into a great training area for people who wanted to better their careers. I feel like any success I've had really began mostly right there.

**Interviewer:**  
That's great. Wonderful, and then you moved on to become the Regional Director of Project Business in Atlanta. How did that happen?

**Marty Lee:**  
Well, Don Floyd contacted me and said I want you to come work for me. So, I was hired as the first regional PB director. Then he hired another person, a woman. I handled the South and the Northeast part of the country. She handled the Midwest and West. We were constantly traveling. I was traveling 70% of the time. I would fly out on a Saturday or Sunday, and come back on Thursday. Project Business was growing at a fast rate. We were promoting PB to area boards and monitoring the areas offering PB. It gave me an opportunity to visit a lot of the country I hadn't seen. I got to know people in all five regions, each of which ran an annual staff conference.

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Regional hired a new person, Linda Provosty...that's her name now, it was Linda LaMonica at the time...she wanted to only stay in the South. She was from the South, so I agreed to go to the Midwest. That's when I went to St. Louis. I now have the rest of the country that I haven't covered before. I got to see virtually all of JA in a much bigger perspective. It was a very good experience for me. But one day during that second year of travel, I woke up and thought I can't do this if that's all that job was going to be. Not that I was disenchanted with JA. I just decided I wanted to go do something else. So, I left JA for three years.

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**Interviewer:**  
What was your function as a regional director?

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**Marty Lee:**

Don Floyd was the national PB director. Don did a lot of the branding, and I did a lot of the expansion. JA had been around for almost 67 years and now our student reach was growing very quickly. It was very successful, but let me talk a little bit about some of our mistakes.

**Interviewer:**

Okay, so, at this point, you've been with Junior Achievement a number of years.

**Marty Lee:**

About 10.

**Interviewer:**

About 10 years, and before we leave that time period, are there any other kind of events that you were involved with, task forces maybe, committees, that sort of thing, other events that we need to just touch on?

**Marty Lee:**

That were earth-shattering? Clearly, Project Business changed JA. That was a dramatic shift in the culture. There was high resistance to it. Long-time employees were saying don't go into the schools. The schools will kick us out. There were all kinds of really challenging paradigms that we had to overcome. But once it happened, it obviously set the stage for the elementary program Business Basics, and then Applied Economics and all those that followed. It was good to be there in the prime, and I had a great experience up to that point.

What was surprising, I guess, to me, was the reputation I'd earned early on. Colleagues at the time would not tell me, but they thought I had committed career suicide when I went to Jackson. I was young enough and stupid enough, I didn't know what I was doing. With Jackson's revival and then with the success in piloting Project Business and building the building, I gained a reputation of someone who field staff would listen to. So I was fairly effective. When I would go into regional headquarters and into area operations, my reputation made it much easier to talk to board members and staff. That's about all I can say about that period.

**Interviewer:**

Great. Any people during that period that you want to tell us a little bit about?

**Marty Lee:**

Well, the most impactful people for me during that time were Marvin Butts, Allen Kirtley, Don Floyd, and Julie Hubbard. I have a lot of other friends that are no longer with JA. There is one story I will tell. This is really true. When I attended PDX...it was held in New York, and it was the first time I'd ever been in New York. It was in July...hot, and I went there in a suit. That was stupid. It was a two-week course back then. Bob Benson was the national trainer. Based on conversations Bob had with me subsequent to this, I was picked probably the number one person who wouldn't make it. That later became a motivator for me, but it was clear that I was not the most popular person to the trainer. So, I just decided to prove to myself I was as capable as any JA rookie.

Bob came to me a year later and said, “Look, I was wrong about you. You clearly demonstrated that you’re much better than I thought. I want to know if you’d be willing to pilot a new concept.” I said, “what’s that?” At the time, you had to train volunteers at night. That was the only time you could do it, and you would do it over 3 or 4 weeks. You’d train advisors in functional groups...production, finance, marketing. You’d have to offer different classes, and you’d have to offer them every night over a 3- or 4-week period to get everybody through the training. Bob said, “I’d like to try an experiment where we do a one-day advisor training during the day. I’ll come down to lead the effort in all this.”

So, I pitch this proposal to my board of directors, and one board member kind of came after me about it. The other board members took him on and agreed that we should give this a try. Marty thinks this is the right thing to do. Let’s do it. So, Jackson was the first, that I’m aware of, in the country to conduct volunteer training during the daytime. Our pilot worked and was eventually replicated in areas throughout the country.

Oh, I have to tell you one more story. I just thought about this. This is the fun part. When recruiting in high schools, you’ve got maybe 1,000 kids, 2,000 kids in an auditorium. You need to make the JA pitch interesting to get them to sign up. When I moved to Jackson, our relations were not good with the high schools. Principals and teachers did not have fond memories of JA assemblies. So, I was really nervous about making this work. That summer, before my first recruiting, I was talking to John Mazzarella from Toledo, Ohio, a friend in my training class. John told me about a new recruiting technique they were using, and I asked what is it? He said we give away money. I said what? So, he tells me they take five one-dollar bills, new crisp dollar bills, and award them to kids in the audience. They hold up the dollar bills. You pause during your presentation and ask questions. If a kid gets it right, you give the kid a dollar bill. He said it grabs their attention. I said, man, is that high risk, but I want to do this.

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I try to make recruiting an educational experience. I hold up the dollar bills and say I’m going to give these away during my remarks. The kids kind of don’t believe you in the beginning. So I greased it early, asking what’s my name? I just kind of gave them something, and a kid answers correctly, so I give him a dollar bill. I got everybody’s attention now.

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Jackson had never exceeded 1200 applications for the high school program. We got almost 8,000 the first year. That’s why I had so many kids show up in the beginning. I did have a teacher come up to me and said, you know, I used to hate these assemblies. I just want you to know that was one of the best experiences we’ve had. I said because the kids really learned something and had fun. I didn’t talk just about JA. It turned out to be a good experience.

**Interviewer:**

That’s awesome. That’s great. So, you stayed with Junior Achievement for 10 years. What made you stay with Junior Achievement that long in the beginning?

**Marty Lee:**

Well, I don’t believe that was ever the goal. It was long hours in the beginning. We would work from 9 in the morning to 10 or 11 at night, but I had energy for it. I enjoyed doing it. Had early

successes and a good mentor. It just felt like everything I touched would turn to gold. You know, every fundraising campaign I did, every recruiting I did, every program. I mean, I won the Regional Growth Award. I got all these accolades. Things were just blossoming, and so I just felt this was something I could do.

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At the 10-year time when I left, it was the exhaustion of the travel, mostly is what it was. I just felt I wanted to do something else. It wasn't that I disliked JA. I was just burned out. I would say the reason why I stayed was it met my personality. I had a lot of success which motivated me to stay, and I made a lot of good friends. Back then, our area offices were not large. I mean, they were 2 or 3 people. So, you had to grow relationships throughout your region.

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**Interviewer:**

And you had operating agreements back then, same as today?

**Marty Lee:**

Yes. Correct.

**Interviewer:**

How did that affect the area offices? Was there a big difference between then and now?

**Marty Lee:**

You know, this was a little hard. I had been schooled by Allen Kirtley that Regionals and National are in this together. We all make mistakes, but you will be much more successful if you have the national organization as your ally versus your enemy. He never used that phraseology enemy; it's just smarter to not burn bridges. I never had a conflict with any area or national.

Another reason is that Marvin Butts, when I first became president of Jackson, visited Jackson and took me out to dinner. I think we went to a bar after dinner. At some point he said, "Marty, I want you to be successful. But if you ever stab me in the back; if you ever talk around about me, I will get you." There was nothing that I didn't understand about that. Marvin talked Jackson into staying open. I was for him. He became very protective and proud of me because I helped him solve a problem which was to keep Jackson open. I think he always gave me good counsel.

I learned much later, more so when I worked in the regional offices, the angst that area offices had with national. I was never part of that. When I was regional PB director I visited some area offices that no one from national had been in for years. That comes back to the reputation thing I mentioned earlier. I mended a lot of fences because I was in there to help them. They knew JA. They did not know Project Business. And they didn't have any history with me creating problems. I helped them create successes. I was a little bit different, and we had some strange people back then.

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**Interviewer:**

And what brought you back after the three years you were gone?

**Marty Lee:**

Well, I love this, and this was in the late '70s, early '80s. We had a very bad recession. Interest rates shot up to about 22%, but I was doing okay the first two years. I had a hardware store. I could've probably held on, but then the third year, about 100 yards down the road from me, Walmart opened up, and they could sell lawnmowers cheaper than I could buy them. I knew I wasn't going to survive that. So, I closed the business down and wasn't even thinking about coming back to JA. I hadn't talked to anybody about it. Don Floyd and I had been good friends. He was president of New York JA and knew a little bit about my situation. I got a call from him one day, and he said, "Marty, the president of Orlando JA is leaving for a regional position. You'd be perfect for it." I competed against five other people for that job, and I got it.

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**Interviewer:**

That's great. I bet it's changed quite a bit down there.

**Marty Lee:**

Yeah, Orlando JA has one of the more spectacular buildings situated in a park. It's beautiful. Their president, Bill Yeager, had been there for a long time, maybe 20 years. The board was looking for some new thinking, new direction. It wasn't very hard to go in there and quickly initiate some changes. I wasn't going to take away from Bill, but I wanted to really step in and light a fuse...not that they were in bad shape. Certainly, it wasn't like Jackson. Orlando had a pretty big staff. We quickly started expanding.

I'd been there a month when I got a call from a board member on the east coast of Florida - Cocoa Beach, I think. He said we've been over here floundering forever, and I really think JA can be big in this area. Why don't you help us out? So, one Sunday a few weeks later, I just drove over there myself. I was amazed! And thought, this is a goldmine. This is incredible. This was an intermediate area at the time, and the most that they ever had was 500 kids. I sat down with their little board and said, look, the potential out here is unbelievable. Here's what I propose. We're going to need some seed money to get going. I put a budget together. I said we're going to have to hire full-time staff. So, the agreement was we'd do it if we could get the grant money. We were able to secure \$60,000 of seed money, and I hired Cathy Haga. Cathy came in and just aced it. I think within two years, she had 3,000 or 4,000 kids in the program. We really had some other good staff and really got program numbers way up, and raised solid funding.

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One of the better stories I remember is we had an awards banquet. They'd been doing it for a long time and in 1983 they wanted to invite Walt Disney. We had a board member from Disney who got us entre, and booked it in one of the Disney hotels. We had a very stringent \$5,000 entertainment budget. My board chairman and I met with Ed Moriarty, head Disney VP. Ed said, "It's going to be great. The Disney family's coming in. It's going to be a good evening, but I am concerned about one thing." We said what? He said, well, "I want you to upgrade your entertainment program. I want to give it to you guys at cost, and that would be \$16,000." I'm like, at cost?

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My board member said, "I understand that. I think it'd be great. But, if we do that, we lose the profits we budgeted for program growth and support for our JA. We just can't afford to do that."

So, he thought about it for a minute, and then he said, "I'll tell you what, if you'll take the \$5,000 you've got and put that towards improving the meal, I'll arrange the show for free."

So, what's the argument here? So, we get to this event, and they will not tell us about the show. Will not tell us about it. There are two things that happened that night. I never, ever want to get up and speak at a banquet hall event, but the board insisted I make some remarks. There were 700 people there, and I get up, and I'm thanking everybody. I talk about the future of JA, and I said within five years...we were, at that time, serving 5,000 or 7,000 kids...we will be serving 20,000 kids. Boy, you should have seen my board and everyone's mouth drop, but I knew it was possible.

The other striking memory was the entertainment which started about 9:30. It was unbelievable! The theme was Around the World, and different entertainers would come out representing different countries. At the end of the show, a man walks out on stage and starts telling a story about how some of the Disney characters came about. Walt Disney sketching a figure on his desk that evolved into Mickey Mouse, with a song created that tied to the character. Then music started and everyone started singing the song. There's this thin white veil on which you see a black line that is tracing Disney characters while the song continues. It's really very moving. Then all of a sudden, the stage goes black, and slowly all the Disney characters emerge.

The evening was a big success. When Scott Riddle replaced me, I told him about the speech and my forecast, and his mouth dropped. But in five years, Orlando was serving over 20,000 kids. I knew that it could happen, and Scott made it happen.

**Interviewer:**

That's fantastic. Well, I'm sure that that night had a lot to do with it and the energy that you built, your enthusiasm, the commitment.

**Marty Lee:**

Great city.

**Interviewer:**

So, you were there two years then?

**Marty Lee:**

Yeah.

**Interviewer:**

And then you moved on to New York and became the Executive Vice President up there for four years. Tell us about that experience.

**Marty Lee:**

It was in February of the second year I was in Orlando. I get a phone call from Don Floyd. We're just chatting. Don and I are friends. How's the weather up there, Don? Oh, god, Marty, it is so dismal. It's been overcast for two weeks. It's gray. Everybody's going nuts. I said, Don, I got the air conditioning on here. I mean, it's sunshine. Finally he said, well, Marty, let me tell you why

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I'm calling. I really want you. Julie's getting married, and she's leaving. I want you to come to New York, and I just laughed, especially after he talked about two weeks of miserable weather. I said, Don, I'm not going to New York. Don pitched it saying that New York will be the first major area to totally convert our high school program to Applied Economics. You are the right guy to lead this transition. I said, Don, let me think about it and I hung up. Next day, Don calls me and says I just want you to come to New York for a couple of days. I'm going to send you first class tickets. I said, Don, no, don't do that. Let me think about it.

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The real issue was my fear of going to New York. I didn't know that I could do that. About a week or two later, Julie calls me. I said, Julie, tell you the truth, I really don't know if I can live in a big metropolitan area...I'm afraid it's too big. Julie said, "Marty, do you realize that Manhattan is only 20 miles wide and 6 miles long?" That argument comforted me. Don sent me tickets and I flew up there. Spent a week. Showed me around. He was really offering me a lot more money than I was making in Orlando.

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Finally, I called him and said, okay, Don, but I have to talk to my board chair. So, I went and told the board chair. He said, look, I understand. I won't get in your way. Is there any way we can keep you here? No, I really don't want this to go into a bidding war. I really have thought about it a long time. I think it's a good opportunity for me. The next day there's an executive committee meeting and I'm not invited. Usually when they do that, it's not a very good sign. After the meeting, the board chairman tells me the executive committee doesn't want to lose you. We will match anything that New York offers you. Okay, let me think about it.

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I thought about it for a couple days, and I called Don up. I said, Don, I got to rethink this. You know, the board's really upset about me leaving. They're countering you - I really can't come. A bit later Don calls me pissed. You already committed to me. You cannot not come. I mean, really put a guilt trip on me. The good thing was, I had not called my board chair to tell him I wasn't going to New York. I agreed to do it, and there were some very good candidates for my replacement.

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**Interviewer:**

Wow. That's phenomenal. When you went up to New York to that very small island called Manhattan, what were the challenges that really tested you and JA?

**Marty Lee:**

Julie had done a very good job in building relationships with the school districts, but I had to hire all new staff because they were all leaving. The only staff person remaining was Jan Ursone, who's now the president up in Stamford. Jan was running Project Business. I hired a new Business Basics director and a new Applied Economics director. We were the first area that had totally dropped the company program. Our goal was 100 Applied Economics classes out of the box, plus 300 Business Basics and 300 Project Business classes, so 700 units, which was substantially more than they'd ever done before. I hired two kids out of college to run those two programs. They made good hires, as it turns out, because they both met all those objectives the first year. Don had been nominated many times before for the Hook Award. He got that award that year for that performance.

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What I struggled with that first year was learning the subway system. Jan Ursone taught me how to navigate the subway, because I couldn't figure out when it came out where the hell were you and how do you know which way to travel on the subway. My second challenge was I felt that I had to cover my southern accent. I always felt like it worked against me, but as it turned out, it really worked in my favor. I was distinctive enough at the time that people would say where are you from?

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One anecdote: We had an Applied Economics teacher from Queens, and after the first year he worked in our office. He called me at home on a Saturday night. We chatted a bit and then he said, "I hate to bother you, but I want you tell you why I'm calling. I have hated people from the South. Can't stand to be around them. I believe I had a pre-life. I was in the war. I talked to my wife about this. I can't even stand to go down there, but I want you to know you changed my picture of people from the South. I just wanted to call and tell you that." I said, "Well, thank you." That was very nice.

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I got in trouble in New York, and it happened the second year. Pete Harder was in charge of Applied Economics. We were running the largest number of programs; Miami was second. John Mazarrella managed Miami's AE program. He was the guy who told me about using dollar bills in JA Company recruiting. He was far behind us - maybe only 40 or 50 AE units. Karl Flemke is National JA president, and AE was his baby. Applied Economics was his contribution to the organization. Karl's telling everybody that CEOs were serving in Applied Economics classrooms. Now, I knew that wasn't happening. We had some good people in the classroom, but they were not CEOs. What happened was I was very good friends with Donna Buchanan. Donna was the national fundraiser. She called me up one day and asked me to come up to Stamford and have a drink with her.

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I went up to her office. There was this wedding hall right next to the office where Donna and I went for a drink. She said, oh, by the way, I've asked Karl to join us. I really didn't know Karl very well. Karl's very curious about AE and Donna had set me up. Donna knew I knew about Karl's promoting CEOs in AE classrooms. She says, you know, Marty has a view about Applied Economics, and I said, like what? She says, well, you know, about CEOs in AE classes. I said, "Karl, I really don't know where you're getting that information. In my experience that's not happening. If it is happening, it is very, very rare." Karl didn't react too much, but the next day, there's a phone call to Don, and three or four people from National are on their way down to New York. Pete Harder is one of them. Don asked what happened? I said, Don, I don't know. I just had drinks with Karl and Donna.

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Pete was very prickly. So I got in trouble by saying that. But there was a positive outcome that evolved from this episode. National had not produced any training packages for AE volunteers. Nothing. Zip. So, areas were creating their own, and I went to great lengths to create New York's AE materials. Gil Folleher was in charge of Programs at the time. I approached Gil and said if you help financially, I will create training materials for Applied Economics volunteers. At that time we weren't too much into computers. Slide shows were our preferred training vehicle. I created the first Applied Economics training package of about 120 slides. From the slides we designed printed functional training components. That was my contribution for the national

effort when I was in New York, and that's the reason, probably, I was asked to do the training job.

**Interviewer:**

Great segue into that. I was thinking that same thing. I'll bet that was truly instrumental.

**Marty Lee:**

Well, what had happened was that when I went to New York, Don agreed that he wasn't going to leave. But after a few years, he was recruited away to Nashville. I applied to be New York president, but Karl wanted Ralph Schulz. Ralph and Karl were very close; Ralph was in Texas I believe. Karl was very influential in getting Ralph involved in interviewing. It was a head-on competition which Ralph won. Following that decision, board chair Frank Kerry flew in this helicopter down to Lower Manhattan. His office was up in Westchester, Connecticut. He flew down to meet with me to make sure that I wouldn't leave. He didn't need to do that, but he did. It felt very interesting, and let me know that it was important for them that I stay.

I told him I would, but it was a year later when Gil Folleher called about this training job opening. I told him I would be interested. They knew that JA National offices were moving to Colorado Springs. So, this training position required relocating from New York to Colorado. I was aware of this.

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The person I replaced was not regarded very highly. Developing and delivering quality training materials was haphazard and in disarray. I spent the first quarter just visiting regionals, not getting defensive, taking the heat, just asking what do you need? After I assessed what I thought area staff were telling me, I spent the next six months attending various commercial training modules around the country. I would hear about different courses that you could buy. I would take some and be certified. In networking with other trainers, I learned which were deemed particularly valuable. I gained extensive experience and expertise, and created a courses catalogue to share with JA field operations. This catalogue offered a number of sequentially ordered courses with prerequisites. It was the first time JA had published anything at that level. And I mean it just was a big hit because the field's complaint was, we don't know what's happening when.

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Cigna, up in Hartford, Connecticut, had their own training campus. It included a hotel and spectacular training facilities. Cigna agreed to let us use them at modest expense. So, for a year or two before we fully settled in Colorado Springs, our training was done in Hartford with very large classes. It was a very classy experience for us all.

**Interviewer:**

Well, did you facilitate the trainings there, or did you bring in outside educators?

**Marty Lee:**

Emmett and I organized and delivered most of the training modules. Two that we didn't lead at the time were marketing courses conducted by Claudia Barto. Bruce Lesley ran Strategic Planning.

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**Interviewer:**

Great. That's pretty exciting to think that you created some of the things that I'm experiencing now. I can learn a lot from you, Marty.

**Marty Lee:**

A funny anecdote - I was the first Training Director when the training department started taking over the National Leadership Conference (NLC).

**Interviewer:**

Who was doing it before that?

**Marty Lee:**

You'd have a chairman, and they'd put a committee together. They did all the work. Everything, and national had little input. I mean, we would do some of the general sessions, but the committee organized the event and agenda. The first NLC where National took an active role was in Minneapolis in 1987. JA National had just moved to Colorado Springs in May, and NLC was in July. Ron Cody was chair. I did all the curriculum. Ron organized the entertainment and social activities. I was the first one to bring in professional curriculum offerings using donated trainers. Ron was a big help and we created the first really significant NLC curriculum that was not just us getting together and talking to each other.

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The NLC ended on a Thursday. We flew back to Stamford HQ for an Applied Economics course that started on Saturday. We had 50 some people attending, and I had recruited Deborah Hendricks in Chicago to help facilitate this. Deborah was flying out of Chicago when a really bad thunderstorm hit. The passengers were told to deplane but stay close by. The flight left without her. So, she missed getting here. On Saturday I'm in my office prepping for the AE training, and I get a call from the hotel. The caller said, Mr. Lee, there's a problem over here with one of your delegates. I said, really? What? This lady is inebriated, and we have done everything we can to contain her. JA rules are on something like that, you send the person home. So, I get over there and figure out what's going on. Apparently, she'd taken some medication, had a drink on the flight and the high altitude triggered her intoxication. I debated whether to send her home or let her stay. We finally settled her down and she stayed, but I conducted most of that AE training.

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**Interviewer:**

Good heavens. Okay...any other stories about Stamford? You were there for the full year.

**Marty Lee:**

Well, Stamford is clearly not the building we're in today. I was in a small office in the garage of the building next door. I lived in New York, and I reverse commuted up to Stamford. That was okay because I really liked New York. I got to know people a lot better and began to understand JA's organizational bureaucracy. Gil and I were close enough that Gil gave me great latitude. What I've learned now is that's what I need, is someone to tell me what they want and then just give me the latitude to go do it. We got great responses from what we were offering. But it was just an old building, we'd outgrown it, and everybody's on top of each other. It was a mess.

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**Interviewer:**

About how many people were there?

**Marty Lee:**

I think probably there were 50 or 60 people at the time. We relocated 35 people. Of all the manager people, Gil didn't want to come. We did bring out one or two exempt people who really wanted to come and we assessed as a good fit. Marvin retired, so he didn't come. There was one guy that was fired. He didn't come.

**Interviewer:**

Where was your New York office?

**Marty Lee:**

We were on Washington Street. 107 Washington Street in New York. Two blocks from the World Trade Center. You can see the building, and I was there on September 11. If the New York office had still been down there, I would've been in that building when that occurred. The time of the attack, they were in their office, but they had relocated up to Midtown. If we'd been down there, we'd have been right there when that occurred. Could've even been getting out of the cab as it occurred.

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**Interviewer:**

Wow. Phenomenal. Okay, so you made the move out to Colorado Springs. What was the transition period from Stamford to Colorado Springs? I imagine it was quite an expensive move.

**Marty Lee:**

Basically, the movers came and picked up all our stuff. I had the movers clear out my New York apartment as well. I spent the night at a hotel. I didn't have a car because, you know, living in Manhattan, I didn't need a car. For a colleague of mine, I had bought a car down in Florida. I went to Florida to pick it up, and I drove out to Colorado. We had a week to get there. Well, when I pull up to the building, it wasn't finished. We didn't have approved occupancy. So, fortunately for me, I had a business trip scheduled, a training somewhere outside Colorado. So, I was gone for another week, and in that week, everything was completed and staff got in the building.

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**Interviewer:**

At this point, how many programs did we have?

**Marty Lee:**

Business Basics, Applied Economics, Project Business, JA Company. We had one at a college level down in Houston, but it never got off the ground.

**Interviewer:**

What was the content of the field training you conducted?

**Marty Lee:**

I conducted management training along with some entry-level program training. We offered financial management training, senior-level courses like MIR and Situational Leadership. I was certified in three or four that I would do myself. Emmett did most of the entry-level.

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**Interviewer:**

So, your audience was mostly mid-level to senior management?

**Marty Lee:**

Senior managers, but I did...oh, I know that course. Damn, I can't think of the name of it out at Seattle. Sorry, drawing a blank on that. I did all the seniors. I mean, Karl, all those people went through my courses which was challenging.

**Interviewer:**

Yes, and how frequently did you do your trainings?

**Marty Lee:**

We'd offer, like, maybe each course twice a year. Of course, PDX was different. We started doing the regional trainings, and then the national training.

**Interviewer:**

And at that time, you had five regions. Did you do five regionals?

**Marty Lee:**

Yes, we had five regions. We had a consistent agenda, but we had regional offices back then. The regional vice president was responsible. We did the curriculum side, but they did all the fun side of stuff.

**Interviewer:**

So, you did replicate some of what you were doing on an individual basis?

**Marty Lee:**

Yeah.

**Interviewer:**

So, the MIR and the...

**Marty Lee:**

I usually didn't hold those at regionals. We had a sales training course that we used. We brought in that...what's the sales training now?

**Interviewer:**

Customer-focused selling.

**Marty Lee:**

Yeah, we brought that into regionals. We would do some of those, but we didn't do all the content things there.

**Interviewer:**

Some of them were outsourced to another place?

**Marty Lee:**

Oh, yeah. You'd have to. We couldn't do them all.

**Interviewer:**

Right, and what was the duration of a regional conference?

**Marty Lee:**

Two and a half days.

**Interviewer:**

Pretty much what they are now?

**Marty Lee:**

Yeah.

**Interviewer:**

And then you had taken on NLC, the National Leadership Conference, at that point. So that was a yearly thing.

**Marty Lee:**

Right.

**Interviewer:**

And you did everything on that, not just the curriculum, but you were doing all of the entertainment.

**Marty Lee:**

But at the same time, we were developing the program training packages. So, yeah, we were picking all those things up, too.

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**Interviewer:**

So, you were really expanding the scope of the Training Department.

**Marty Lee:**

The budget significantly increased. The organization understood there was a growing need for training and development. Don Floyd was a very strong advocate of this, and my budget went through him. Sometimes, they'd even have more money than I put in, which was always good.

**Interviewer:**

Nice. Did you say that Don came to Colorado Springs, as well? Don Floyd?

**Marty Lee:**

Oh, yeah.

**Interviewer:**

Okay, so he was here with you, and other than that, other than you and he and Emmett, how large was the training team at that time?

**Marty Lee:**

Don was not part of training. He was the Executive Vice President. There was Emmett and me and one secretary. Soon after we settled in Colorado Springs, National hired a Director of Human Resources, John Nayden. I reported directly to John, but my budget development strategy evolved while we were in Stamford. The model I created was a grid matrix based on a defined dollar amount per course attendee. Of course I had backup data to substantiate how I derived my per person amount. It was a great way that senior management could look at it and say, okay, I understand how you got here, and it made it much easier to get that budget through.

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**Interviewer:**

All right, now what year did you move here to Colorado Springs?

**Marty Lee:**

'87.

**Interviewer:**

1987, and then you were Vice President of Training for how long?

**Marty Lee:**

Well, it must've been two years. After John was hired, JA promoted Jim Goodman to Vice President of Personnel reporting to John. Goodman was a 20-plus-year employee. Jim was not acclimating well to John, and John wasn't acclimating well to Jim. So John had Jim report to me, but things still weren't going well. Eventually John told me he wanted to make a change. I told John that with his support that I'd do it, not him, because Jim was reporting to me.

John agreed. So, we eased Jim Goodman out, and John initiated a national search for a VP of Personnel. He was not satisfied with the candidates who applied. I was at a meeting in Florida looking at a new satellite training course. I got a call from John saying, "I just can't find anyone for this VP Personnel slot. Why don't you take over personnel? I just need you to find somebody and train them." I said, John, you got to be kidding me. I don't know anything about personnel, one. Number two, that's a dated career. Why would I do that? Well, think about it. I didn't think very long because I wasn't going to do it. The next day, I got a call from John. He said, think about it? I said, yeah, John, I'm not going to do it, and he said, well, it's too late. That's what you're doing. I already told Karl you're going to do it.

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So, that's what happened. I took over a job I knew nothing about. Absolutely nothing. The one thing in my favor was Amelia Kochman. She had some training and personnel background. I told Amelia you're just going to have to front for me for a while until I can learn this stuff.

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So, I began to read...I became an incredible reader over time, and may have attended some courses. I was amazed over time that I was absorbing it, and it actually became pretty interesting, particularly the legal side, and within a year, I guess I was kind of fearful. I just woke up one day, and I could talk like a lawyer. I could almost guess what they were going to say, and also, I began to learn that if I talked to five lawyers, I could get five different opinions, and so I knew all of it was my choice. I had to listen, and then I would take the risk based on what I thought was the appropriate risk for the organization.

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What began to happen was a team function that was not highly regarded by our area offices began to produce services and products that they had never had before. While I was reading, I was hiring people who knew what they were doing, and that kind of kept people away from me so I could figure out what I was doing. I remember one day, Amelia walked in and said, you know, I'm really...she did say the word pissed off. I said, what's that? She said, you know, you now know more than I do. That was fun. I got to the point where there was not a question people asked me that I couldn't give them an answer. I could pick out what were the key things you need to focus on, and I learned those pretty quickly. The big challenge at that time was the pension plan. I became very involved in working through that issue.

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In general, most people don't know very much about pensions. I certainly didn't, and it's very complicated. There were some legal things going on at the federal level that put our plan at great risk and some hard, tough decisions were having to be made. Fortunately, we made some very good investment decisions. We made a lot of good plan changes. We increased the benefits significantly. We enabled four COLAs, cost-of-living increases to employees, which had never happened before.

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**Interviewer:**

Great benefits, and so you were the Vice President of Personnel, or HR, for how long?

**Marty Lee:**

I started that about 1988 and I did that until, like, 1995. When the Senior Vice President left, they brought in Ralph Schulz as Executive Vice President. Ralph decided that he didn't want another senior VP. He wanted me reporting directly to him.

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**Interviewer:**

So, you took a year off in 1995?

**Marty Lee:**

Yeah.

**Interviewer:**

And what made you leave?

**Marty Lee:**

We had a new president and Kathy Whitmire had been hired. I was instrumental in the hiring process. I think she's a brilliant woman, but she displayed a style issue that was very difficult for me. She said things in private that were dramatically different in public. She also had a tendency

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to trust what anybody told her. Here's an example: James Sullivan was a staff member in Atlanta. The board made the decision to ask the President to retire. So, I went down to handle that transition.

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I was meeting with the board chair, and they were going to promote James, and I said, look, you can do that, but James has never run a franchise and certainly not at this level. If you hire him, his learning curve is going to be significant. He's probably not going to be able to get there as quickly as you want. There are some good people who'd be interested in this market. You're going to pay more, but their experience and skill set are strong so you're going to get to your goals a lot faster. The board acknowledged this makes sense. So, they opened it up, and as it turned out, they hired Donna Buchanan, which turned out to be a very good selection. But what happened subsequently confirmed my feelings I needed to make a change.

The Chamber of Commerce organized a dinner at the Broadmoor to honor Karl Flemke as Leader of the Year. JA bought a table where I was seated. Kathy was late arriving, and sat down beside me just as the event's starting. She leaned over to me and said, "I just got through talking with Hamner Williams, who was president in Cincinnati. He told me that you blocked James Sullivan from becoming president in Atlanta." I said, what? She said let's talk about it later. So, I'm sitting there the whole dinner, you know, thinking what the hell is this all about?

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She accepted, as a matter of fact, that I stood in the way of an African American becoming president of a major franchise. I said, Kathy, that's just not true. Several incidents like that continued to happen, and it became apparent to me that we were not a good fit. My philosophy is if I can't support who I'm working for, I'm not going to get in the way. So, I went to her and told her I felt I needed to resign. I did what she needed publicly, but that's why I left.

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**Interviewer:**

Takes a big person to be able to do that.

**Marty Lee:**

Well, it was the right thing to do. You know, I can't support...not that she was wrong. She's the president. They hired her. I wasn't the right person to be in this job to do that for her.

**Interviewer:**

And that's the whole nature of HR, isn't it?

**Marty Lee:**

Yeah, I mean, I was close enough to know that sometimes changes like that have to occur. I resigned on December 5. More challenging was the call I got from the board chairman, Desi DiSimone, a week before Christmas. I thought he was just calling to wish me a Merry Christmas. I mean, I didn't know why the hell someone on the board's calling me, but he was like, I heard you resigned. Tell me what the facts are.

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And I felt, oh, wow, I don't want to go there. I said, Desi, I will have a conversation with you, but on one condition. That you allow me to tell Kathy I had this conversation with you, and he said okay. He also agreed that he would have a conversation with Kathy, but he would call me

before he spoke with her. I said to Desi, if I were in your shoes and trying to coach Kathy, here are two or three things I would say to her. I don't remember what they were. Sometime in January I'm in Kathy's office. She said, I just got a call from Desi. I said, Kathy, he called me, and here's what I told him. I was trying to be helpful. I said I'm sorry. So, it was a little strained, but got through it.

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**Interviewer:**

And then Jim Hayes gave you a call? Is that it?

**Marty Lee:**

Well, two things happened. I get a call from a member of the board, maybe it's Desi. The Board had decided to terminate Kathy, and wanted me to manage her separation. And they want me to bring Jim Hayes aboard. I said, Desi, you have a head of HR there who hired a guy to replace me. Desi said, we know, but we think you know the organization better, and we would prefer that you manage it, and we'll pay you for doing it, and I said, okay.

I said, but you tell this HR guy not to take it personally. Explain why you are bringing me in because I don't want to cause ill will. So, I managed Kathy's transition out, I managed Jim's in, and I was through. Several months later, I get a call saying Jim Hayes would like to have lunch with me. I just thought Jim was following up, because I had given him some coaching about how it's going to be different coming from the private sector into the nonprofit.

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So, we got together, and he said I need to make a couple changes at the senior management level. I want your counsel about it. I listened to his cases. I told him what his liability was, and here's how to handle it, et cetera, and then he called me back later and said, would you handle these transitions. I agreed to do that. Sometime later he asked me if I will come back as a JA employee. I said I'm really not interested in doing that. Jim responds so, how about being a consultant? I agreed to do that and find myself working pretty much full time. Jim at some point said, Marty, look, you're working virtually full-time...why don't you just get paid for it? So, I agreed to come back into that role.

**Interviewer:**

Wow, that's great. Now, Dan Verbest was at the national headquarters, too, at that time, right?

**Marty Lee:**

Yeah.

**Interviewer:**

What was his position?

**Marty Lee:**

Well, Dan was head of our Development Department, and the fact is, when I was head of HR, Kathy decided she wanted Dan to step down, and she wanted Pete Rohan to step down. He was in the national office too. Those were two long-term employees. I got Kathy to let me manage those personally because I was trying to honor their commitment, but it was obvious she wasn't going to work with them.

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**Interviewer:**

You handled some very difficult situations when you were the head of HR?

**Marty Lee:**

Yes.

**Interviewer:**

Very, very difficult, and they could've been a lot worse, I'm sure.

**Marty Lee:**

Well, the times were changing pretty fast. It was unheard of to let a 20-year employee go. It just didn't happen, and when we let Jim Goodman go, it caused quite a ruckus. Legal liability was becoming much more challenging, and you really had to know what you were doing, and you had to know how to protect yourself. In the years that I was head of HR, I'm pretty accurate about this, we never had a lawsuit. Billy tells me she tells this story, saying Marty's the only HR head who can tell a person they're fired, and by the end of the conversation, they're feeling sorry for him. I don't know. My feeling is that when you terminate somebody, as a rule, they already know it's going to happen.

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The only way that I could ever handle those is the belief that when you do it, you are really doing them a good service because they were ready to go. They just don't know it. They're too fearful to do it on their own. So, they've created, for themselves, sabotaging behaviors that have caused you to have to make this decision. Once you make the decision, you're really doing something for them they cannot do for themselves, and in most cases, they end up in better jobs than they had before, and they're much happier. You're much happier, but at the time, the moment, it doesn't feel that way.

**Interviewer:**

That's phenomenal. I'm really impressed with that theory. It sounds pretty accurate.

**Marty Lee:**

It's true. I've seen it too much. Good example is Dale Johnson, who's now down in Nashville. We did downsize and Dale was a senior officer and downsized. Today, Dale would tell me this has turned out to be the best thing that's ever happened to him. He's a community leader and his wife has a great job. I said, Dale, remember how you used to tell me how angry you were? You were burned out in that other job, and you know it, and I know it. But it didn't feel like it, he said. My choice was taken away from me. I said that's the issue.

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**Interviewer:**

Fantastic. Okay, I know we're getting into the last period of time you spent here at the national headquarters. They moved you right up to Executive Vice President and Chief Operating Officer. Tell us about that experience.

**Marty Lee:**

Well, how this evolved was, as the head of human resources, I often had to have challenging conversations with the President about different issues and recommendations about employees. So I dealt with a lot of very sensitive issues.

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One day, I went into Jim Hayes and said, Jim, look, you're a great guy. Here are your assets, but what's happening from my viewpoint is that things are falling through the cracks right and left. You cannot manage the big picture and keep up with the details. You need somebody to run the inside operation. I don't know who, but here are some people I'd recommend. You really need to seriously consider this because times have changed. We're moving too fast. Things are getting too big.

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Maybe several months later, Jim asked me to come into his office. He said, Marty, you know, I really think you're right. I'd like you to do it. According to Jim, he said I have never seen such an expression on your face. Almost fear. He thought I should feel ecstatic. Finally, the moment I could talk, I said, well, Jim, I'm sorry I'm not reacting the way you thought I would. I'd like to think about it, because let me just level with you. I've watched people in this job for years. Nobody has been able to make it. You cannot win in this job, and I just don't know that I want to take that on. I'm honored you're asking me, but man, it just burns people out so quickly. Let me think about it. He agreed and I talked to my wife about it.

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When I finally decided to accept, internally I recognized this is the last of my JA career. I never felt that I was qualified to be president, nor did I feel I ever wanted to do it. Serving as JA, Inc. president requires a political personality that I don't have. So, I agreed to do it. The first challenge I knew I was going to face was all these senior VPs who'd been my peers and relished the idea that they were reporting directly to the president. Now they're reporting to me, and as good as people are, there is an emotional challenge to that, and I wasn't sure how it was going to work. It has worked out, but it was easier for some and more difficult for others.

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**Interviewer:**

Well, that was eloquently said. We have 10 minutes on this tape, so I'll finish up here. Then we'll continue when you tell me you're ready, or shall we just do that now and continue?

**Interviewer:**

Well, Marty, just to continue on here. I know we're getting close to the end of the story. As you look back now on the big picture of your whole career with Junior Achievement, one thing I wanted to ask you was, did you ever think that you would become the COO when you first became the program director in Atlanta?

**Marty Lee:**

Oh, absolutely not. I was intimidated by working at national, you know, so I never saw this. It was the farthest thing from my mind. But I really appreciate the opportunity and the experience I've gotten from doing this.

**Interviewer:**

And the secret of that success and that development was?

**Marty Lee:**

Well, I really believe in JA and what we do, that's one. Two, I always did the best job I could do. Number three, I believe that we are more effective when we work as one organization than we do if we work at two or multiple. And four, I've had some very good mentors and people who have watched over me and helped me and coached me. I think those are the keys to me getting here. I have a very interesting word that shows up over the last few years in the National Business Hall of Fame. Many times I've been asked to be an "escort" to one of the laureates and I've had a great opportunity to escort some very prominent laureates. As you get to know them and talk to them one of the questions you ask them, like you're asking me, is what is the key to your success?

I have always been fascinated by the use of one word. I don't care who they are, they've all used one word somewhere in the context of how they describe their success and they said luck. They use the word luck. I said what does that mean? And they said, I was just at the right place at the right time. And so, I can say the same thing. I can say I was there when I got the phone call from that teacher in Jackson, Mississippi, the right place, the right time. If I had not attended that regional meeting or that national meeting, I wouldn't have known about it. And so, I was at the right place at the right time and the success of that launched me at the national level, that's when I started to begin to get a national reputation. So, I do understand a little bit of what they're talking about.

**Interviewer:**

Well, there was a lot of hard work, too. I can see your successes as you describe them along the way building the numbers, reaching more kids and really having an impact on lives, so building the relationships and having the right attitude.

**Marty Lee:**

I think attitude is extremely important. All the good people who do well, one of the characteristics you can say about them is they have the right attitude. I have not seen too many people make it that have bad attitudes. They just don't.

**Interviewer:**

That's great. Well, congratulations on all of that. What would you say are the greatest failures or successes of Junior Achievement along the way that you have seen?

**Marty Lee:**

Let me talk about failures first. While we're very good at what we do, we have failed to gain the national awareness that we need. We're still not known well enough. We're not in the same category as the Scouts or the Boys and Girls Club, so we've missed that mark. Tantamount to that is we've not raised the kind of dollars at the level that we should have. We have done quite well with our key customer base in the business community, over and over, I mean, they fund us. What they would tell us is we're one of the few organizations that every year they give money to. Now, they may give a lot more money to somebody else, but we are the ones they give to year in and year out, so be thankful for that.

But we're a \$120 million when we should be a \$250 million company. We fail miserably in diversity in staff hiring. When Don became head of Project Business and then I joined, there were only one or two women in the organization at the management level. Don and I used the hiring part of the business manager to change that. Now, part of it was conscious and part it was the economy of skills. We kept running into some very talented women and we weren't paying a lot of dollars, you know, back then but they wanted the jobs. The infusion of those positions really changed to, now, we're 77 percent female. But we still have done a horrible job on ethnicity. We just do not have the diversity of thinking that we need. We've gotten much better with women and you look at some of our big major markets now they are run by women. We've had three women receive the Hook Award, which has been really good, so that's happened in a fairly short time.

**Interviewer:**

Right, very positive.

**Marty Lee:**

Successes, I still feel like we're one of the best managed from the viewpoint of our stakeholders. The business community is still our primary resource. Generally, we're a very well-functioning organization. I think we continue to demonstrate most of the time high standards of business ethics. I think in spite of our organizational structure, which is the autonomy of our franchises, the franchise system is our greatest strength and it's our greatest weakness, I mean, it works both ways. And I'm real clear, having served in an area office, how important it is for that board to feel like they own it, because their ownership motivates them to do things they wouldn't normally do.

The problem we get into is that we have people who choose to run area offices that make this a personal organization and their ego gets in the way of what best benefits the kids. But, most of us keep remembering why we're here. I'm sure all organizations have some level of frustration, but when I started with JA there were less than 250,000 kids and today, we're over four million. I will give you a prediction, I will tell you that within 10 years we will be doing somewhere around 15 to 20 million in some kind of delivery.

**Interviewer:**

Do you think our programs will look different?

**Marty Lee:**

Yes, delivery will look a little different.

**Interviewer:**

What are the challenges we're going to face in those next 10 years?

**Marty Lee:**

The big challenge always is financial resources. The second biggest challenge is staff who have the capacity to manage at that level. And probably the third challenge is that the schools will be teaching differently. Now, I will tell you, whether people want to hear this or not, technology will play a much larger role in our delivery. The problem is that schools are so far behind where

everybody else is. What we are capable of doing, they're 10 years behind us and it's going to take them a while to catch up. When they catch up to us, if we're positioned right, we will be one of those organizations that they'll say we need this and we're there.

What we missed was, and this happens under my watch so I'll own it, was the readiness of the schools to accept that our staff were intelligent around technology. We are an organization that by and large hires people to be salesmen and that's what you do in a local office, you're selling. Raising money, selling programs, and technology is a tool, but you don't want to get too close to it. There are a few pockets where they are pretty good, but not enough. So, that's my view.

**Interviewer:**

That's great. As you look back on your own career, and I know you have some things that you need to get done here, but what was the most rewarding experience and accomplishment that you've had in JA?

**Marty Lee:**

Boy, the one that I think that's going to have the long-term effect was my ability to convince the President of the company that we really had to focus on technology. We had to understand that our real future lies there and we need the resources to make that happen. And, it's very high risk because it's a big black hole. I mean, the reality is it costs a lot of money and the moment you've got something, the next moment you know it's out-of-date. I do know that if this company isn't focused on it, we will be left behind.

**Interviewer:**

Very good. If you had it to do over again, would you do anything differently?

**Marty Lee:**

You know, I can't believe anybody can say they would do anything differently because you never know what the outcomes were. All you have is the outcomes you have. I've had to make such tough people-decisions. I've had to let people go who are my friends. I've laid up too many nights worrying about that. One of the nights, that was my longest, I was sitting out in front of my house at four in the morning. I really believed in my heart that our pension plan needed a change - that the model JA used rewarded older long-term employees. And, we should reward long-term employees. But the workforce was changing so dramatically that if we could get somebody to come work for us for 10 years, a good person, and if that person after 10 years didn't leave with some reward for that, that was wrong.

While I didn't want to take away from the long-term person, we just weren't going to get people to stay 40 years now. That's a dinosaur. I felt I was being placed in the role of God. Like, how do I know this decision is the right decision? How do I know that what I think and believe is the right thing? And by what authority? Because I knew that I had both the positional and personal influence to make the change happen. I knew that it had taken five years to get to this point, because it was such an emotional issue. I was up till four o'clock in the morning weighing that decision. I knew I just had to say, well, look you've gone this far, you've believed it all this time, you know, you're going to pay some prices for this. There are some people who, obviously, don't agree with it, those people who are around for a long time. But that plan was adopted in the

1940s and life's a lot different today than it was in the 1940s. So, I feel like that was a pretty dramatic issue. Today people can argue, well, our plan is in trouble, our plan is underfunded. But that's not because of a change in plan, that's because everyone's investments are suffering.

**Interviewer:**

Well, I think most employees thank you for making that decision.

**Marty Lee:**

Well, I just feel it's the right thing to do. I think we're just more educated financially. Young people are just savvier than we were. I don't believe that we should be paternalistic about employees. I mean, the moment you start playing parent you play by a whole different set of rules and the rules should be that I'm trying to hire somebody who knows what they're doing. They should take care of their life. The job of the company is not to save your life. We're to help you plan yours, and pension is just one leg of a three-legged stool that you have to solve in your retirement. We want a good plan, we want one that works, but we also want one that gives people options. The other plan gave people no options.

Where I learned that the best was when an employee who had given over 20 years of his life and his soul to this company, but he was ready to leave and he didn't know whether it was best to step down. He stepped down; he started very young, and at his age when he left the value of his pension was virtually nothing. Because he had not gotten to the point, age-wise, where it was starting to really create value. So he has not a lot of money, and it's frozen. He can't touch it until he's 65 and it's going to be worth less from the standpoint of the value of the dollar today until he's 65. He should've gotten something worth his 20 years. He should have, in my opinion. That's my value system. Other people would say no, he should've stayed his full 40 years in the company. Well, there are just not a lot of people doing that anymore. And we shouldn't have a plan for the few, it should be for everybody.

**Interviewer:**

Okay, before I ask you the last question, which will be what do you want to be remembered for? Is there anything that we've left out that's really important that you want to share?

**Marty Lee:**

I'll probably think of something.

**Interviewer:**

You probably will.

**Marty Lee:**

Well, yeah, Jerry Mutchler pointed out something to me that I would put it under the category called resiliency. Jerry said, Marty, and when he mentioned it, I never thought about it before, but he said "Marty, it's amazing you have served more presidents than anybody else, directly, and you survived." I mean, that's the term he used. And I thought about that. I really hadn't thought about it, but then when he said it, it was like, wow. Yeah, you know, I don't know what that means, but it's not easy to adjust to four different manager styles at that level. Although one,



I didn't, you know, I left, but at least I was there for a while. But no, I can't think of very much else to say at this time.

**Interviewer:**

That is certainly to your credit going through four presidents and serving each one of them the way that you did. It's pretty phenomenal. What would you like to be really remembered for? One of the stories you didn't tell was the story of that little girl. You changed her whole life.

**Marty Lee:**

Oh, in the classroom?

**Interviewer:**

That's such a phenomenal story.

**Marty Lee:**

I first started out in JA as program director. I was very involved with the kids and that's the role you played, so you got to know the kids pretty well. As your career progresses and you move towards those management positions your distance between the kids grows. Of course, now I really have a lot of distance between the kids. So, I look at my wife now and say most of my life has not been with the kids, but most of my career life has been with the people who make it happen. Because I was very convinced that if the staff didn't do their jobs well, the kids wouldn't have good experience. And so, I made the conscious decision that I had to focus on making sure the staff did their jobs well. I had to trust that all these other things were happening, but my job was to make sure that the staff were successful.

What would I like to be remembered for? Well, this is probably the ego. A few years ago, one night my wife and I were talking. She asked me, what's your career aspirations? What do you really want to do at JA?" I said you know I really don't know specifically, but what I would like to do is be one of the top three people who have some influence in the direction the company takes. That's as close as I got to defining it.

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What I guess I want to be remembered for is that whatever direction the company is taking, that I've helped influence. I did it for what I believe would help the company be a better company, better help on behalf of the kids. I think I can truly say to myself that I was never doing it for personal gain, personal ego. I've had to make some tough choices. I will still have to make some tough choices. I really try to have a very balanced look at all the information, all the facts, and make the decision I think is right, not one that's necessarily the proper thing to do. So, that's what I would like to be remembered for and that's what I did.

**Interviewer:**

Well, I certainly think you've already succeeded at that Marty. I see you as a great mediator too. As somebody who stays very calm in all circumstances and does look at both sides and tries to weigh and understand everybody's position, but at the same time look at what is best for Junior Achievement. But you have to end with the little story of Elizabeth.

**Marty Lee:**

Elizabeth. Have you ever heard this? The story is that I was asked to teach a fourth-grade class in this little elementary school that's close to Fort Carson. I had gone in the day before to meet with the teacher, like you're supposed to do, and get to know the class before you go into your first class. So, the teacher was describing to me that these were all good kids, but none of them had grown up in Colorado Springs. They were all transient kids and they were an average class. We talked about how to do discipline and her rules and that kind of stuff. And, as I started to leave there was a young girl with her head down on her desk. The teacher says, by the way, that's Elizabeth. And Elizabeth, don't take it personally, but she will not raise her head while you're here unless you have an activity or something. You will not be engaged with her; you can't get her engaged.

I'm leaving and I said, okay. I didn't ask a bunch of questions. Of course, as I'm leaving, you know, I'm thinking about what do you mean you can't get that kid to raise her head, you know, it's just a kid? You know I've been a trainer. I know all the tricks of the trade and I know how to do this. So, I went to prepare for the first class primarily focused on Elizabeth. I mean, I was really going to get this kid. And, in the first class she had not raised her head, so I said well, you know, first try no big deal. So, the second week I went in there again and I pulled out some more tricks and nothing happened. The third week I went in there and this was it, she's really challenged me now. I was really pissed off. So, again, I could not get that child engaged.

And so, I was reminded of my wife, who is a professional speaker, telling me that when you're speaking to an audience there are certain people you can never reach. And if you focus on those people what you're really doing is not doing due service to everybody else. And so, I reminded myself of that. But I'm preparing for class and there's one exercise about a pizza shop and the head of the pizza shop, the president of the company, was Elizabeth. That was actually the name in the material. And so, of course, my light goes off and when I get to class, she has her head down. Just before I start, I go over and kneel down by her and she has her head turned away from me. I said, Elizabeth, today we have an exercise that I really need your help with. We're going to do an exercise around profit and have a company, a pizza company and the president of the company is Elizabeth. I just thought, you know, it'd be good for you to do.

So, nothing happened, but anyway she finally turned her face over to me. It was the first time I heard her talk and she said well, what do I have to do? And I told her that, you know, you have to come in front of the room when we start to do the exercise. You're the president of the company, you'll sit up front and choices will be made, but you get to make the decision. You're the head, but I'll help you make the decisions. So, she said okay. We got to the exercise time and she did it. She got up, came up, and people were a little surprised that anything happened. She was really timid, but we got through it. But the next week was the final week, so I came in to do all the wrap-up and I brought treats. You know, we do all that kind of stuff. When I first walked in her head was down, but after I started talking, she sat up.

What was important about it was that I finish up and I gather my stuff and the kids are saying bye. As I get to the door there's a tug on my coat. I turn around and there was Elizabeth. She sticks her hand out and opens it up. In her hand, which I still have at home, is a polished rock that I hadn't noticed on her desk. She handed it to me and said, Mr. Lee I want to thank you. She was the only kid that gave me anything and so, you know, I just hugged her, which you're not

supposed to do but I did, and walked out. The lesson I learned was that you don't label kids, you don't give up, and it's basically one kid at a time. I'll never probably see that kid alone again, but I do believe that experience will have some impact. She will not forget it. I mean, I won't forget what she did, but she won't forget that experience either. I don't know what it means, but that's why we do JA, you know?

**Interviewer:**

That's right. I think you probably were behind the new slogan *leave no child behind*.

**Marty Lee:**

Yeah, right.

**Interviewer:**

Well, thank you very, very much Marty. It was a great interview.