

Ms. Mary Carlson Foley

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Summary

Twenty-five years of leveraging the power of data to capture federal, state, corporate, and foundation awards for clients.

- Use a data-driven approach to market research, strategy development, and outcome quantification to create a competitive advantage.
- Offer capture management, program management, and proposal/grant support.
- Capture large pursuits involving multiple client offices across multiple states.
- Strong communication, analytical, and strategic positioning skills.

Experience



Carlson Foley
Enterprises LLC

Carlson Foley Enterprises, LLC
Managing Director

2020 - PRESENT
1997 TO 2015

Founded Carlson Foley Enterprises to provide federal business development consulting expertise backed by environmental credentials to clients in environmental, engineering and energy industries. The firm also serves multiple nonprofit clients. The Company offers regulatory and market development expertise with emphasis on expanding client federal market penetration and accurately assessing the impacts of changing federal laws and regulations that drive business opportunities for environmental consulting firms.

The Company has held contracts with EPA, DOD and GSA (MOBIS) and provides environmental program support, stakeholder communications, facilitation and small business outsourcing assistance. The firm changed its name from Leverage Enterprises, LLC in 2005.

- Facilitated the EPA Brownfields Assessment and Cleanup grant award panel process in 2003. Two teams of approximately twenty EPA staff representing all ten EPA regions met in San Francisco and Philadelphia to review several hundred grant requests prioritize them, discuss every application to generate feedback for the applicant, and discuss in detail the short-listed applications in order to develop rankings and evaluation information for final awards by the EPA Administrator. My responsibilities were to facilitate these multi-day meetings, keep the panels on schedule, insure all participants had the opportunity to make their opinions known and placed on the record as the panels tried to reach consensus, insure that all participants adhered to the rules governing the award process such as a prohibition on contributing information relevant to the request but not included in the written submittal, and ensuring that discussion of each application was limited to evaluation criteria. The process successfully awarded over \$70 million in grants to communities in 38 states, five tribal nations and two US territories.
- Facilitated the 2002 and 2003 EPA OSWER innovation grant evaluation panels

- Provided proposal support to a client whose project manager was unavoidably unavailable to assist in a major proposal re-bid effort. Leverage Enterprises analyzed the RFP and developed a compliant proposal outline, drafted the proposal, worked with technical staff to enable them to efficiently incorporate their input into the document and produced a document for production on schedule. Client was awarded this \$19.5M award without going through the short-list process.
- Provided presentation coaching for a client shortlisted on USFS service procurement (Eastern Region). Client had predominantly western experience and had recently had a USFS contract terminated early for the convenience of the government. My job was to help win the procurement...and we did!
- Conducted a nationwide study of mid-sized water utilities to identify those most amenable to acquisition. Methodology used included analysis of all environmental notices of violation received by water utilities (several thousand listings), assessment of the degree of enforcement action taken by EPA or the states at each facility, and correlation with municipal bond ratings. Analysis showed a high degree of congruity between poor bond ratings and multiple environmental violations. Provisions in the SDWA allow for regulatory relief for utilities undertaking 'substantial management change' that might reasonably lead to improved operations. The study identified 25 water and 25 wastewater utilities among the several thousand facilities in the initial database for further consideration by the client.
- Won a GSA MOBIS contract for the firm and assisted other environmental firms with developing winning submittals for the GSA MAC 899 schedules. I wrote the technical volume and outsourced the financial volume to Aronson LLC. Won 100% of the GSA proposals submitted.
- Developed a strategic assessment of the market potential for future water and hazardous waste business opportunities in the Pacific Northwest. Study included particularly close assessment of DOD (Seattle, Portland and Walla Walla Corps as well as individual installations) and EPA programs in Washington, Oregon and Idaho though all federal agencies were examined. Study included budgets and budget trends, major programs, major contracts, contracting trends, competitors and acquisition forecasts. With this data the client was able to determine the manner in which it wished to pursue further penetration of this regional market.
- Provided DOD utility privatization/outsourcing assistance to a management consulting firm advising western US regulated and investor-owned water utilities. Multiple projects included evaluation of the DOD water utility privatization market, and assessment of groundwater arsenic contamination.
- Assisted an eastern regional engineering and transportation firm to increase its federal business in the areas of GIS, hazardous waste and water quality studies. Work focused on EPA and DOD clients as well teaming with strategic prime contractors and selected 8(a)'s.
- Provided on-going lead generation, market research and capture strategy development to a major hazardous waste prime contractor. Also provided orals coaching and proposal support as requested.
- Analyzed the Federal Acquisition Regulations and identified options for negotiating a sole-source DOD contract continuation after current contract expiration. Convinced NE Corps of Engineers that a one-year sole-source extension was appropriate though the base decline to continue working with the Corps.
- Provided merger & acquisition support to a company in the DOD outsourcing market.
- Researched and developed strategy for negotiating shared savings with the Corps of Engineers under a value engineering change proposal. Enabled client to receive shared payments based on the value of costs saved over four years, in excess of the Corps' typical one-year policy.
- Developed a marketing campaign designed to increase enrollment in the on-line Masters in Public Administration, Non-Profit Emphasis, at George Mason University. Work was

underwritten by funding from a Kellogg grant. Included a focus on website design and developing strategic alliances with for-profit sponsors and non-profit end-users.

- Provided red team review and recovery support to a large environmental management firm bidding on a Tulsa District of the U.S. Army Corps of Engineers procurement. Work included red team review and recommendations on the draft proposal and working with proposal staff in the following days to draft text, revise graphics, clarify points with the client and finalize the proposal. Team was awarded the contract, their first ever at this AF base.
- Provided in-depth market analysis of federal privatization opportunities and participated in the evolution of the DOD privatization of utilities. Services included market research, lobbying, teaming and proposal support. Developed a database of all CONUS installations with water utilities, their designed capacities, POC's, privatization strategy and schedule. One of five industry representatives invited to participate in the DESC water/wastewater privatization forum in June 1998. Provided briefing to the Office of the Deputy Under Secretary for Industrial Affairs and Installations on the municipal market's water/wastewater privatization experience. Orchestrated teaming on A-76 and privatization opportunities. Introduced client to strategic partners. Spoke at the 1998 National SAME Conference on the topic of utility privatization. Developed strategic as well as specific tactical recommendations for the client.
- Developed a comprehensive yearlong re-bid strategy for a CERCLA Top 10 NPL procurement. Support included pre-RFP strategic actions, teaming and red team/red team recovery assistance. Client was selected for the \$19.5M award without going through a short-list.
- Conducted a nationwide study of the contracting patterns of the US Army Corps of Engineers Civil Program. Gathered data on all active Corps contracts and analyzed the results to pinpoint trends in small business set-asides, design-build, variances between Corps Districts, and market concentration/segmentation for four different water resources markets.
- Designed and executed a market research project designed to determine how multinational firms in aeronautical, pharmaceutical, environmental, electronic commerce and communications markets acquire internet law information & services. Survey generated four times the typical response rate.
- Provided support to the US Environmental Protection Agency's Brownfields program by preparing Revolving Loan Fund training modules for use over the internet.
- Served as rapporteur for the Defense Logistic Agency's three-day conference on the Basel Convention, an international treaty governing the international transport of hazardous waste. Produced a draft report of the two-day conference within 48 hours after it adjourned. The report summarized issues presented during the conference and articulated barriers to DOD implementation of this international environmental program. Also advised DLA on logistical issues associated with planning a successful conference. A final report was later produced and accepted by the client.
- Served as Interim Executive Director of the Environmental Business Action Coalition, formerly known as the Hazardous Waste Action Coalition. In addition to serving as Treasurer of the organization, I was responsible for the daily operations of this 60-member trade association. Work included programmatic support including lobbying Congress and the Executive Branches (particularly EPA) as well as development of Congressional testimony and policy positions. It also involved member recruitment and retention; Board of Directors coordination and support; publications fulfillment; website maturation; conference development and publicity; public relations support during name change; and employee recruitment/independent contractor management. Created (in 1996) and served as editor of the weekly newsletter, *EBAC At Work*, identified by the members as the service of greatest value to them from the trade association.
- Developed a database of all Department of Defense water utility privatization procurements including schedules for CBD announcement, RFP release, and proposal submittals as well as geographic location and client business unit. This database enabled the client to analyze the large number of opportunities and develop a strategic approach to the overall market.

- Researched the requirements an entity must meet to qualify as a US business in the US Agency for International Development procurements. Enabled client to develop a strategy enabling it to qualify for the benefits of bidding as a prime US contractor.
- Provided an in-depth assessment of the President's Energy Plan and developed recommendations for market opportunities likely to result from this new federal initiative.
- Provided in-depth description and analysis of federal expenditures on water resources projects including funding patterns by state, region, federal agency and type of project, assessed market fragmentation and key competitors for each federal agency and type of project and analyzed contracting and funding trends likely to impact future federal water resources expenditures. Enabled client to craft a major strategic initiative in this market area.
- Reviewed and provided editorial suggestions to the Maryland/DC Chapter of The Nature Conservancy's case study supporting the Last Great Places Campaign.
- Developed and funded a successful direct mail campaign on behalf of an animal welfare organization. For over a decade this appeal has generated a return on investment exceeding ten times the cost of the annual campaign. With an average donation of \$50 the annual campaign raised more than \$27,000 in 2013.
- Developed website content and design and directed website and Facebook content management for nonprofit organization providing low income families with oral health care.
- Provided on-going marketing support to a venture capital startup firm offering an internet-based database of remediation technologies. Included directing branding strategy, developing the 1999 marketing plan, conceptualizing and implementing their 1999 publicity program (press releases, technical papers, article placement and press interviews) and improving trade show effectiveness. Also provided direct sales support and introducing the Company principals to industry executives. Provided editorial support to their monthly on-line newsletter both in terms of editorial focus and in writing.
- Free-lance writer publishing nonfiction articles for newspapers and magazines.
- Provided proposal support to a client whose project manager was unavoidably unavailable to assist in a major proposal re-bid effort. Leverage Enterprises analyzed the RFP and developed a compliant proposal outline, drafted the proposal, worked with technical staff to enable them to efficiently incorporate their input into the document and produced a document for production on schedule. Provide orals coaching support. Client was awarded this \$19.5M award without going through the short-list process.
- Provided small business recruitment and subcontracting plan administration for wastewater treatment plant operations at Picatinny Arsenal.
- Managed development of two chapters of the EPA Brownfields Revolving Loan Fund Administrative Manual
- Led the capital campaign to raise \$500,000 for a new nonprofit organization wishing to open a new dental safety net clinic in the Piedmont region of Virginia. Challenge was great because the nonprofit was new and had no track record and the project did not yet exist. Campaign successfully met its goal in six months with a 99% win rate for grants.
- Was honored, together with my husband André Hintermann, as a Hero in Healthcare for our work starting Piedmont Regional Dental Clinic.
- Co-chaired the first Mission of Mercy project in the Piedmont as an awareness-building event prior to starting the capital campaign that would open the Clinic in July 2011.
- Won dozens of grants for nonprofit organizations with a win-rate of over 90%. Identified targets using The Foundation Center databases, GuideStar and personal contacts. Services included opportunity identification, relationship building, proposal writing, coordinating letters of support, developing financial projections and project budgets. Training and experience in Combined State Campaign (2015) and crowdfunding (Give Local Piedmont 2015). Donors included corporate and private foundations, quasi-governmental

foundations, local and county governments, and federal government. The majority of donors have made multiple awards.

- Created an annual direct mail campaign for an animal rescue organization. Campaign raises approximately \$30,000 annual with an average donation of just \$125. Mailing goes to 5000 households in US and Canada and enjoys a 4.6% response rate. The mail campaign is now in its 23rd year and is the largest fundraising activity of the nonprofit organization (Aussie Rescue and Placement Helpline).



Piedmont Regional Dental Clinic
Executive Director
Volunteer

2015 - 2020
2009-2015

Responsible for all phases of operations at \$1.2 M dental safety net clinic providing access to affordable oral health care in central Virginia. Challenge is to achieve sustainability for a rural clinic with no state funding paying competitive salaries when over 90% of the patients are low-income and pay with Medicaid or self-pay on a sliding-scale fee schedule. Strategies included assembling a high-functioning team, re-balancing salary/benefit programs, controlling costs, attracting repeat clients from a large rural catchment area, improving patient satisfaction, expanding fundraising, and improving production.

After seven years of losses despite significant founder funding, PRDC is now slightly in the black for the first four months of the current fiscal year without additional founder monies.

- Increased utilization and improved net earned income by 41% year over year (January 2017 vs January 2016).
- Conceptualized and secured funding for new programs addressing the needs of underserved regional populations
 - Winter Heat Shelter Program – free dental care for the homeless (Culpeper Wellness Foundation)
 - Periodontal Care For Adult Diabetics at Free Clinics (Dominion Foundation and Culpeper Wellness Foundation)
 - Spanish-language Oral Health Education For Parents (Northern Piedmont Community Foundation)
 - Direct dental care for undocumented children (PATH Grant, Northern Piedmont Community Foundation, pending). Only organization to receive full funding, and we did it two years in a row.
 - Expanded Smile Time exams-at-school program to 22 schools and Head Start organizations. Adapted the equipment and process to create "Senior Smile Time", a program of exams-in-nursing homes addressing a major gap in care.
 - Our Turn To Serve – free dental care for low income veterans on Veterans Day (ten private, corporate and in-kind donors) has completed five years of service and treated patients from 41 counties and independent cities. PRDC is now known for leadership statewide in care for low-income veterans.
- Increased new patient flow. Created an integrated on-line and social media outreach platform that enables patients to download HIPAA-compliant forms (with an option to complete them out on-line) and learn about our services, links with social media (primarily Facebook) and increasingly uses video as an outreach modality. For Children's Dental Health month (February 2017), PRDC shot multiple videos, one of which on 'how to brush the teeth of a 2 year-old' was viewed more than 3400 times in two weeks. This content integrates with cable television commercials, blogs, on-line

campaigns, TV crawlers and traditional newspaper advertising. PRDC onboards 150-200 new patients per month.

- Manage participation in CMS Meaningful Use. All providers participated in Stage 1 and 2. This electronic health records incentive program realized \$200,000 in payments for the Clinic. An audit by CMS in 2018 found PRDC rightfully received incentive payments for the 2016 year.
- Doubled the number of D4, pediatric residents and dental hygiene students from VCU working at PRDC throughout the year. Student evaluations of their PRDC experience have significantly improved.
- Upgraded Clinic operations to comply with evolving regulatory requirements.
 - Completed retrofitting the Clinic with a deal water continuous decontamination system as recommended by CDC in December 2016. (Culpeper Wellness Foundation)
- Founded and chair Healthy Connections Orange, an ad hoc group of 30 non-profit, for profit and government entities serving Orange County's health. Monthly meetings facilitate information transfer and networking.
 - During Medicaid Expansion in Virginia, was successful in getting DMAS to send a speaker and representative from the MCO's to Orange to meet with regional individuals active in expansion. Attendance was higher in rural Orange County than in many large metropolitan locations where the same presentation was offered.
- One of three clinics state-wide to participate in a two-year Medical/Dental integration project funded by HRSA through the Virginia Department of Health and coordinated by the Virginia Oral Health Coalition: Grants to States to Support Oral Health Workforce Activities" (Funding Opportunity Number HRSA-16-038). Our efforts focused on structuring the Dentrix Enterprise EHR platform to send encrypted clinical summaries via the patient portal to medical providers regardless of what EHR they used. The process involved cross-coding to SNOWMED (later SNODENT) and implementing multiple communication paths such as eFax and Sharefile as well as the native Dentrix capability. Medical providers now routinely receive HIPAA-compliant updates from PRDC after patient visits.
- Served on the Board of the Virginia Oral Health Coalition from its inception through early 2016.



Brown & Root Environmental
Director of Business Development

1989 TO 1997

Responsibilities included managing major government clients: DOD (Pentagon, NAVFAC, LANTDIV & EFACHES, and the Baltimore Corps), DOE (HQ, ID, AL, OR), EPA HQ, USDA, USDOJ, and USDOT. Each of these clients represented opportunities in multiple technical areas, frequently for multiple BRE offices.

- Served as BRE's rep to the Hazardous Waste Action Coalition. Chaired the EPA Subcommittee and the Recruitment/Membership Services committees. Served as liaison to the Board of Directors and on the Government Affairs Executive Committee for four years. Lobbied Members of Congress for Superfund reauthorization, authorizing language to distinguish technical from support service contractors, and stable DOD funding. Initiated the highly successful weekly publication *HWAC at Work*, which was later selected by members as the most highly valued service offered by HWAC. Also was instrumental in the development of an affiliate membership category.

- Researched and drafted speeches for Peter Arrowsmith, President and CEO, including a series of very favorably received presentations on corporate minority subcontractor recruitment presented as part of the US EPA panel and the annual Superfund Conference in Washington, DC.
- Won BRE's first Tulsa Corps HTRW contract (\$5M). Work included sales contact with Tulsa Corps staff, capture strategy development, and proposal red team review/recovery.
- Won BRE's first DOE-ID prime HTRW contract (\$7M) which enabled the Company to start an office in Idaho Falls, ID and increase future DOE-ID business.
- Won BRE's first EPA award outside OSWER in over a decade bringing in the potential for over \$6M in OPTS work.
- Prepared an Agency-wide in-depth assessment of the EPA market targeting procurements upcoming the next three years and policy trends that posed a threat to the Company's position as one of EPA's Top 5 contractors. Received a promotion as a result of the quality of this work product.
- Awarded a ~\$5M LANTDIV procurement that was scheduled for unrestricted rebid by facilitating its replacement with a sole-source (8)a non-competitive award for the Company's protégé with BRE as a 49% subcontractor. This was the Company's first new LANTDIV award in 7 years.
- Executed DC-area responsibilities as a capture team member for large federal procurements: working Capitol Hill, coordinating efforts of BD consultants, creating positive regard for the Company at senior Department levels, working program and contracting officials on issues prior to RFP finalization, and ensuring current HQ policies, priorities and politics are reflected in BRE proposals. Contributed to winning procurements such as EPA RAC 1 (~\$417M), EPA RAC 3(\$165M), EPA HMIRT/ERTP (\$30M) and DOE OCCRWM.
- Won both nationwide prime contracts for the ~\$500M RCRA Subpart X market at DOD installations (\$50M Mobile Corps contract and \$7.5M AIRHAZ/HAZWRAP contract). Developed and implemented a comprehensive business development campaign targeting 150 military installations from Puerto Rico to Guam to maximize BRE's RCRA Subpart X work. Responsibilities included serving as team leader, sales training, sales management, collateral development and both strategic and tactical planning. Successfully captured >50% of the Army and Navy clients for this service.



Tetra Tech, Inc.
Associate Director, Business Development

1987 TO 1989

Responsibilities included marketing hazardous waste management and marine science services to private, state and federal clients for five regional offices from Kansas City to Anchorage. Won federal contracts with the DOE, EPA, USDI, DOC and DOD. Won state contracts in Washington, Oregon, Montana and Missouri.



Lewis Clark State College
 Lewiston, ID
Director, Small Business Development Ctr.

1986 TO 1987

Established and directed a regional Small Business Development Center for the Small Business Administration. Acquired stable, long-term funding for the Center from sources including the SBA, DOD and the Idaho Department of Education. Worked closely with regional economic development entities to stimulate the economic viability of the region. Managed three federal grants, consulted with over 200 small business clients and 1000 training participants in the first eighteen months of operation.

Education



Eighteen-month curriculum taught by faculty from the Harvard Business School (HBS),

Harvard Business Analytics Program

2019-2020

the John A. Paulson School of Engineering and Applied Sciences (SEAS), and the Faculty of Arts and Sciences (FAS). Twenty+ hours per week studying quantitative analysis, operations and supply chain management, digital strategy and innovation, data driven marketing, programming and data science systems, leadership and people analytics, and data science pipeline and critical thinking. Student Ambassador.



George Mason University

Coursework, Ph.D. Program,
Environmental Science & Public Policy

1993-2002

3.75 GPA Coursework included: Geochemistry of Environmental Hazards; Wetland Ecology and Management; Estuarine and Coastal Ecology; Waterscape Ecology; Environmental Law for Biologists; Models, Policy Design and Implementation; Public Policy Process and Issues in Public Management; Molecular, Micro and Cell Biology and Financial Management of Environmental Infrastructure
Research area: Attenuation of Munition Contamination in Hydric Soils



Boise State University

Master of Business Administration

1984



Colorado State University

B.S., Zoology

1981

Training

Strategic Coach: Two-year program of quarterly business coaching for growth-minded entrepreneurs. Limited to entrepreneurs with over \$100,000 in annual revenues.

HarvardX:

- *Technology Leadership: Lab to Market* Certificate: dc7b87d5b06542e79f01f02accf1fdcc
- *Entrepreneurism in Emerging Economies* (current enrollment)

Skills

R, SQL, Python (interpretation only), WordPress, Excel Data Analytics Package, Remote Meeting Technology, Customer Relationship Management software, Tableau, Tableau Prep.