



**Crestline RFP Response Capabilities,  
Experience, and Senior Consulting Team**



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# Business Consulting Strategies & Healthcare Solutions

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## EXECUTIVE SUMMARY

Crestline Advisors, an HMA Company, is pleased to present a brief description of our capabilities in Request for Proposal (RFP) response development and the experience and qualifications of the Senior Advisors on our bench of RFP writers. Our team includes experts in the full range of tasks required to prepare for and develop a compliant and compelling RFP response and post-award steps for contract readiness to the wide variety of procurements targeted.

## OUR TEAM CAN ASSIST WITH:

Pre-Opportunity Review →

Pre-RFP Release Work →

RFP Strategy and Win Theme Establishment →

RFP Review →

RFP Response Development →

Implementation Support →

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## **COMPANY BACKGROUND**

Crestline has been providing procurement services for Medicaid managed care organizations (MCOs) and specialty health plans since 2016. In April 2023, Crestline joined the Health Management Associates (HMA) family of companies. Crestline can now tap into HMA expertise by enhancing our procurement services with HMA consulting knowledge in healthcare and human services, enabling us to help our clients develop higher quality RFP responses. HMA is an independent, national research and consulting firm specializing in publicly funded healthcare and human services policy, programs, financing, and evaluation. HMA serves government, public and private providers, health systems, health plans, community-based organizations, institutional investors, foundations, and associations. With offices in more than 20 locations across the country and over 500 multidisciplinary consultants coast to coast, HMA's expertise, services, and team are always within client reach.

## PROPOSAL RESPONSE DEVELOPMENT EXPERTISE

The hallmark of the Crestline team is our relevant operational and clinical subject-matter expertise in addition to strong writing and proposal development experience. The combination of these skills sets us apart from other health care proposal development consulting firms. Crestline offers end-to-end support for RFP response development, specifically for Medicaid, Medicare, and specialty health managed care programs and services. Unlike other proposal consulting firms, Crestline does not recruit its consultants using LinkedIn or similar sites; instead, we work with a carefully vetted, core group of veteran colleagues.

### CRESTLINE CLIENTS →

Crestline's proposal response development team members have collaborated on proposal work with nine national Fortune 500 health plans to-date. We have prepared responses to RFPs and Requests for Information (RFIs) for Medicaid managed care organizations (MCOs) in **25 states**.

### CRESTLINE'S SUCCESS RATE →

Since January 2015, Crestline's proposal development team has contributed to winning bids in **over 80% of proposals for our health plan partners, and 90% for specialty health care procurements**. This includes proposals for a wide range of Medicaid and specialty health care lines of business, including aged, blind, or disabled individuals (ABD), Temporary Assistance for Needy Families (TANF)/Children's Health Insurance Program (CHIP), managed long term services and supports, members with intellectual/developmental disability (I/DD), and children and youth involved with the child welfare system.

## CRESTLINE'S APPROACH TO RFP RESPONSE DEVELOPMENT

Crestline's team of expert technical writers uses an industry standard, comprehensive approach to craft RFP responses that are fully compliant with all RFP and model contract requirements, are responsive to RFP questions, and showcase the value our clients' solutions and differentiators will bring to health care consumers, providers, and the state agency issuing the RFP.

Our team assists clients with capture management, proposal management, and proposal development in an integrated effort to win new business or re-procure existing business. During the capture planning process, which includes pre-opportunity review, pre-RFP release work, and RFP strategy development, Crestline engages a specialized team of experts to assist with network strategy, analysis of public health issues, engaging and learning from providers, and analyzing existing documents and materials (e.g., existing RFIs, available RFI responses, available RFP responses from previous procurements within the same market and in similar markets, documents released by state agencies, etc.). Capture planning often includes large group discussions to identify high-level strategy and smaller group meetings to facilitate targeted discussion by clinical and operational subspecialties. Finally, Crestline supports clients with "feet on the street" to conduct stakeholder outreach when appropriate.

Crestline uses a tried and true proposal management process to ensure there is appropriate implementation and oversight of the RFP response process. This includes mapping out necessary activities and deadlines and maintaining a project plan. Through this process we can keep track of all required deliverables, such as requested data points, member and provider success stories, letters of support, documents required for appendices, graphics, etc. Using this proposal management process also allows Crestline to make sure due dates for successive drafts, reviews, and revisions are met.

During the pre-work phase Crestline consultants get to know the leaders and SMEs at the health plan to ascertain their work styles and communication preferences. Our consultants have found that SMEs often have unique preferences, such as co-creating content in real time or engaging in a series of submissions and revisions of drafts. During proposal development, Crestline consultants are flexible and nimble so that we can meet the preferences and needs of our health plan clients. Typically, each RFP question is assigned to one Crestline writer and to one health plan content owner, with additional SMEs identified to support the response development. Our writers request required materials from content owners to assist with draft development and inform them of areas that are still in question for developing responsive and compliant submissions.

Typically, we work with content owners and SMEs through a strategy meeting and at least two subsequent cycles of drafting, review, and revision. Crestline creates a first draft using existing content from recent responses, health plan documents (e.g., the Quality Management Plan), and materials created during pre-work. Usually this first draft is about 75% complete. Crestline recommends using a mock scoring approach where peer reviewers read and comment on drafts at each review cycle to ensure they are compelling, responsive, compliant, and demonstrate true value to the State and its population. During review with a large group of senior leaders and SMEs, we present our work and take notes on how to make improvements, detailing who will provide additional content to fill in existing gaps. Crestline and client content owners and support SMEs work together to create the needed narrative, data points, and graphics to address feedback of mock reviewers and health plan leadership. This cycle repeats two or three times until the response is deemed superior by mock reviewers and executive leadership at the health plan.

## OUR APPROACH TO PROPOSAL DEVELOPMENT

### 1 Pre-Opportunity Review

- + Evaluate potential size and scope of RFP
- + Review known provider composition of the local market
- + Determine high-value providers and stakeholders
- + Establish financial implications of bidding based on known factors
- + Examine non-financial risks of bidding
- + Consider implications of local demographics, geography, and political landscape
- + Review existing documents, such as State Health Improvement Plans, to identify pain points and state goals

### 2 Pre-RFP Release Work

- + Conduct a competitor analysis
- + Review county health data across the locale
- + Complete a Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis
- + Identify critical providers in the local market
- + Distribute provider surveys
- + Perform and analyze member, provider and stakeholder focus groups
- + Create, deploy, and analyze survey and reporting data
- + Develop relationships with local advocacy organizations
- + Use information to target outreach efforts at the provider and stakeholder level

### 3 RFP Strategy

- + Review analysis from steps described in #2
- + Develop mitigation strategies for SWOT gaps/weaknesses
- + Assess model of care options for the local market
- + Review health plan outcome data
- + Appraise health plan contributions to the local health care landscape
- + Establish win themes and identify differentiators
- + Collect and curate member and provider success stories

### 4 RFP Review

- + Establish list of requirements from RFP scope of work, model contract, and other applicable documents
- + Determine if there are existing gaps in services and design solutions to mitigate risks
- + Develop strategy for initial creation of responses (e.g., determining where existing content can be found)
- + Collection of relevant materials, such as program descriptions, policies, and procedures, etc.

### 5 RFP Response Development

- + Outline RFP responses
- + Participate in strategy discussion
- + Draft content based on existing RFP responses
- + Manage relationship with SMEs and content owners to develop new content where needed
- + Selection of proof points and success stories for inclusion
- + Develop and submit graphics for creation
- + Participate in review meetings with SMEs and leadership
- + Multiple cycles of revision based on feedback from SMEs, leadership, and external reviewers (if applicable)
- + Preparation of required attachments
- + Tracking of requirements against content to ensure compliance with RFP, model contract, and other applicable documents

### 6 Implementation Support

- + Track regulatory and contract requirements to ensure adherence during implementation
- + Develop training materials specific to the new line of business for health plan staff
- + Outreach to stakeholders and conduct engagement activities
- + Create required policies and procedures
- + Create necessary workflows and desktop aids
- + Participate in readiness review
- + Create member and provider manuals and website content
- + Provide network management support, such as contracting and credentialing
- + Develop marketing and collateral information, such as Frequently Asked Question documents, and external communications



Crestline's Senior Team  
of RFP Response  
Development Consultants

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**Tim Mechlinski, Ph.D., M.H.A.**  
Managing Director

Tim Mechlinski is the Managing Principal of Crestline Advisors. Tim is a well-rounded health care management consultant with experience in R.F.P. response development, project management, program design, workflow development, operational review, and compliance auditing.

Tim leads most of Crestline's proposal response development team, assisting clients with all facets of the R.F.P. response process, including pre-opportunity review, pre-RFP release work, and R.F.P. strategy and review. He is an experienced researcher with extensive experience in both qualitative and quantitative approaches. By specializing in data analysis and visualization, Tim uses his skills to drive successful R.F.P. bids and to assist clients in presenting the data that demonstrates the value they bring to their clients and customers.

Tim joined Crestline Advisors in February 2014. His previous roles include working as a lecturer and professor of sociology at the University of California, Santa Barbara (UCSB), Lewis and Clark College (Portland, OR), and California State University Long Beach. Tim also worked as a senior program evaluator for federal grants.

Tim earned his Bachelor of Arts in French and Sociology and Master of Health Administration at the University of Southern California, and his Ph.D. in sociology at UCSB. His academic work has appeared in both theoretical and applied peer-reviewed academic journals. Tim is also an alumnus of the Peace Corps.



**Shannon Walters, M.C., L.A.C.**

Shannon Walters, M.C., is a versatile professional with more than 25 years of experience in the health care industry. She has worked in both provider and health plan organizations and held leadership positions in the utilization management, provider relations, and network operations departments, and crisis assessment. Shannon has been responsible for the management and director-level oversight of large departments in which she developed policies, procedures, workflows, improved processes, and developed intense employee training and supervision protocols. These efforts lead to increased employee satisfaction and performance.

Shannon has supported national Medical MCOs with pre-RFP release work, such as a review of the bidder's previous responses and analysis of competitors' recent responses to identify potential differentiators and gaps requiring mitigation. Her areas of writing expertise include care management and network management.

Shannon joined Crestline Advisors in 2015. Since that time, she has assisted Crestline's health plan, and provider clients with Medicaid managed care Request for Proposal response writing, process improvement, policy and workflow creation, implementation of new programs, and strategic planning.

Shannon received her Bachelor of Arts in Psychology and Master of Counseling degrees from Arizona State University. She is a Licensed Associate Counselor in Arizona and has lived in the Phoenix metropolitan area since 1985.



**Carol Bruce-Fritz**

Carol Bruce-Fritz is a seasoned healthcare management consultant and former not-for-profit administrator. She draws on insight and skills gained through broad and varied professional experience to assist health plans and healthcare providers in crafting compelling responses to competitive procurement opportunities. Carol's consulting expertise focuses on providing proposal project management, writing, strategy, and program development services to clients responding to competitive procurements.

Carol's experience spans the range of functionals related to R.F.P. response development, including opportunity assessment, capture management, content management, strategic analysis, proposal development and management, quality assurance, and production. Carol's areas of writing expertise include integrated care, healthcare system transformation, and serving at-risk populations.

Carol was formerly a principal with Health Management Associates (HMA), a national healthcare consulting firm specializing in Medicaid and other publicly funded healthcare programs. While at HMA, Carol advised providers, health plans, and foundations serving at-risk populations in proposal development, governance, strategic planning, healthcare system transformation, integrated care, and innovation. She also established policies and processes for proposal development and oversaw HMA's national proposal team, which produced more than 1,000 competitive and noncompetitive proposal submissions annually. Carol's healthcare experience includes both behavioral and physical health, integrated community-based healthcare systems, and collaborative provider coalitions. Carol joined the Crestline team in 2019.

Carol received her Bachelor of Arts in Communication from the University of Colorado, Colorado Springs, and has developed and implemented marketing and communications strategies for United Way and the American Cancer Society.



**Jennifer Brummet, L.P.C.**

Jennifer Brummet, L.P.C., is an adaptable professional with over 18 years of experience working in various behavioral healthcare and child welfare settings across the country. As a Licensed Professional Counselor in Arizona, Jennifer is an approved clinical supervisor under the Arizona Board of Behavioral Health Examiners. Clinically trained in the treatment of Eating Disorders, Trauma, EMDR, Substance Abuse, Dialectical Behavioral Therapy, and Cognitive Behavioral Therapy, Jennifer's experience working in both public and private sectors enables her to assist organizations in acquiring accreditation, credentialing and licensing. Jennifer's expertise extends to conducting data validation, quality assurance, and utilization management auditing of providers and Managed Care Organizations.

Jennifer joined Crestline Advisors in 2015. Since that time, she has worked with an array of healthcare entities. These include integrated health care, behavioral health, mental health organizations, state agencies, and Managed Care Organizations. Her consulting focus includes leading project management teams for the implementation of statewide foster care organizations, request for proposal response development for specialty health services, offering clinical practice and quality improvement techniques, conducting organizational assessments, giving technical assistance around clinical programming and process flows, steering contract negotiations, and supporting service capacity building.

Jennifer Brummet received her Bachelor of Arts in psychology from Arizona State University and her Masters in Counseling from the University of Phoenix. She also holds a certificate in Non-profit Leadership. As a Licensed Professional Counselor in Arizona, Jennifer is an approved clinical supervisor under the Arizona Board of Behavioral Health Examiners. An avid student of yoga and a certified children's yoga instructor, she helps other yoga teachers understand and work with children with special needs.



**Michele Grignon, M.C., L.P.C.**

Michele C. Grignon, MC LPC, is a seasoned health care management expert who has 21 years of experience in managed care consulting, health care accreditation, clinical operations, and call center environments. Michele has served in management and executive roles for national managed care companies and provider organizations, overseeing utilization management functions, training programs, and behavioral health and nursing crisis intervention services.

Michele joined Crestline Advisors in October 2016 with a primary focus on completing utilization review and data validation projects, request for proposal writing, and managed care operations projects.

Michele received her Bachelor of Arts in Psychology and Sociology from the University of Wisconsin, Madison, and her Master of Community Counseling from the University of Phoenix. She became licensed as a professional counselor with the Board of Arizona Health Examiners in July 2004. She is certified to provide clinical supervision to Arizona-based counselors and social workers seeking independent licensure.



**Elizabeth Harken, J.D.**

Elizabeth Harken, J.D., is a seasoned compliance executive with experience in a broad array of health care programs throughout the United States. Elizabeth served as the chief compliance officer for a national managed behavioral health organization. During that time, she oversaw compliance with 15 state Medicaid programs, as well as Medicare Advantage, Employee Retirement Income Security Act (ERISA), state insurance requirements, federal contracts, and Employee Assistance Programs. She has developed and managed: the fraud, waste, and abuse (FWA) prevention and detection program; privacy program, including implementation of Health Information Technology for Economic and Clinical Health (HITECH) amendments; compliance training and education; and internal audit and ethics hotline. In addition to her compliance experience, Elizabeth served as the director of grievance and appeals. She was responsible for developing and operationalizing policies, workflows, and staff training materials consistent with state and federal requirements.

Elizabeth joined Crestline Advisors in January 2015, with a primary focus on compliance programs, fraud, waste and abuse prevention, and detection, and operationalizing health care regulations, accreditation standards, and licensing requirements. She also provides proposal response development services, primarily focusing on legal and regulatory functions.

Elizabeth received her Bachelor of Arts in Psychology from Cornell College and her Juris Doctorate from the University of Iowa. She is a member of the State Bar of Arizona.



**Annette Kuhn-Wine**

Annette is an adaptable and forward-thinking professional with 30 years of experience in healthcare. Beginning her career as a certified substance abuse counselor, Annette has also gained operational experience in managed care settings including provider relations, provider network development, network adequacy, provider training, and monitoring. For the past 15 years Annette has consulted nationally for large and small, non-profit healthcare agencies optimizing business and clinical functions, leveraging technology such as Electronic Health Record (EHR) implementations.

As a writer, Annette has written grant applications and proposals ranging from local program development, and service delivery to statewide Medicaid managed care contracts specialization in staffing, training, administrative requirements, and network management. She works collaboratively with accountable owners and subject matter experts to design and develop solutions to address RFP specifications and requirements, which then informs the development of the proposal response.

Leading EHR implementations and provider network projects, Annette has experience producing and delivering successful results within complex business environments. Her responsibilities include analyzing specifications, leading solution design sessions, creating technical and training documentation, and facilitating change management sessions paving the way for business optimizations and efficiencies.

Annette received her Bachelor of Science in Addiction Studies from Park University and Bachelor of Arts in Communications and Graphic Design from Newman University.



**Joanne Scillia, RN, BSN**

Joanne Scillia is a registered nurse with over 30 years of senior-level experience within the healthcare space, including public and privately held for-profit organizations, not-for-profits, and startups. Ms. Scillia has extensive experience in building new programs and re-establishing current programs, incorporating improved efficiency, quality, and financial performance using technology, improved policy, training, and establishing a culture of accountability.

Joanne's expertise includes the following populations and programs Medicaid, Medicare, Dual Eligible Special Needs Plans, institutional care, and chronic special needs programs. She has held executive-level positions within health plans, Accountable Care Organizations, integrated health systems, health care consulting organizations, and provider organizations such as hospice, palliative care, and home care. She is highly familiar with the Joint Commission and the National Committee for Quality Assurance and has led multiple organizations through successful accreditation. Joanne's knowledge base extends into population health, risk stratification modeling, integrated complex care management, long-term supportive services, utilization management, and behavioral health.

Joanne joined Crestline Advisors in 2022, with a primary focus on proposal writing (e.g., care management, long-term services and supports, utilization management, quality, and value-based payment arrangements) as well as utilization review and data validation projects, managed care operations projects and population health, including risk stratification methodology and hot spotting.

She received her Bachelor of Science degree in Nursing from Florida International University and resides in New Jersey.





**Michelle Squire MSN, RN, CCM**

Michelle Squire is a registered nurse with over 25 years of experience in health care, including acute care, commercial non-profit health insurance, and managed care operations. She has extensive experience driving health care strategies in diverse and rapidly evolving environments, propelling growth, and improving processes throughout organizations.

Before her consulting career, Michelle was the Director of Medical Management for a large health plan in New York City. She was responsible for pioneering innovative ways to deliver high-quality and cost-effective healthcare to some of the state's most vulnerable populations, through the establishment of best-in-class care management and utilization management programs.

Michelle is a published author, with her 2019 publication about Whole Person Care Management leading care management solutions and strategies across the healthcare continuum. Her publications focus on evidence-based and holistic approaches to population health and the necessity for integrated methods in care coordination processes.

Michelle joined Crestline in 2022 with a primary focus on proposal writing. Her areas of expertise include population health, care management, utilization management, quality management, maternal and child health (including medically fragile children and foster care populations), transitions of care, LTSS, diabetes self-management, risk stratification, and information technology.

Michelle received her Master of Science in Nursing Degree from Walden University and resides in New Jersey.



**Melissa Lahr Thomas**

Melissa is an accomplished executive with more than two decades of experience in local and national health systems and managed care operations. In her consulting work, she has led teams in implementing data-driven strategies for both for-profit and non-profit entities, including planning, proposal and grant writing, policy development, implementation, evaluation, oversight, and monitoring. She brings a unique blend of industry knowledge with the ability to navigate complex regulations, manage processes, and provide actionable outcomes.

Before her consulting career, Ms. Thomas was the Branch Chief of Program Operations at the Arizona Department of Health Services, responsible for leading the clinical, network, and operational management of behavioral health. She integrated care services throughout the State of Arizona. She is experienced in both healthcare and government with a strong background in working with the legislature, State and federal regulatory agencies, health plans, providers, advocates, and members. Melissa began her career as a Principal Consultant with a focus in healthcare in 2012; she began working with Crestline Advisors in 2014.

As a consultant, Melissa specializes in proposal writing, policy, procedure, and training development; managed care innovation; project management; program implementation, monitoring, oversight, and evaluation; group facilitation and strategic planning.



**Jeanna Thorpe**

With over 25 years of health care experience, Jeanna has worked with managed care organizations, state agencies, and providers in over 20 states. She brings to the table a unique perspective of having consulted with multiple types of entities. These include not-for-profit and for-profit providers of service, county and State governmental entities, and not-for-profit and for-profit national and regional managed care entities, as well as serving on the leadership team for a national managed care organization in Arizona.

Jeanna has extensive knowledge of Medicaid/Medicare managed care and health plan operations. Specific areas of expertise include provider network design, development, and management, contract negotiation, provider relations; credentialing; member services, regulatory compliance, and policy development.

As a proposal writer, Jeanna has worked on over 100 proposals ranging from local program development, and service delivery to statewide Medicaid/Medicare managed care contracts. She works collaboratively with accountable owners and subject matter experts to design and develop solutions to address R.F.P. specifications and requirements, which then informs the development of the proposal response. She also has experience serving as the proposal manager responsible for producing and delivering compliant proposals within complex business environments. Responsibilities included scheduling and running proposal kick-off meetings, leading solution design sessions, facilitating key review meetings, final document review, and coordinating proposal governance/sign off. Jeanna's writing expertise includes network development and management.

Additionally, Ms. Thorpe has been part of the "on the ground" implementation team for several statewide Medicaid health plan implementations. Jeanna has over 20 years of experience as a Principal Consultant with a focus in healthcare; she began working with Crestline Advisors in 2014. She received her Bachelor of Arts from Arizona State University.



**Christine Wells, Ph.D., M.B.A.**

Christine Wells is a clinical psychologist with over 25 years' experience in the health care sector. She has held executive leadership positions in clinical and operational management in community-based provider organizations and a managed care organization.

In her role as a regional executive director with a managed behavioral health organization, she had responsibility for the management of comprehensive mental health services for a commercial health plan, including member services, provider network, claims management, and utilization review. As a non-profit executive, Christine was the lead for a team that developed the first facility licensed in Arizona to offer integrated primary and behavioral health care and wellness services exclusively to individuals living with serious mental illness. Christine has served as interim executive director for the National Alliance on Mental Illness Southern Arizona.

Since joining Crestline Advisors in 2017, Christine has assisted Crestline's health plan and provider clients with RFI/proposal response writing, implementation of integrated care processes and policies, facility licensing, process improvement, delivery system transformation, and strategic planning. Her writing expertise includes mental health and substance use, care management, and integrated care.

She earned a Bachelor of Arts degree in Psychology and Sociology from Mount Holyoke College. She earned a Ph.D. in Clinical Psychology from Clark University along with a Master's in Business Administration from the University of Vermont. She is currently a licensed psychologist in Arizona and has lived in Tucson since 2006.

# Contact us

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