

Karen M. Halstead, MBA, CAE

Executive Director · Audited 2026-09-06

Advance

Fit 72/100

Confidence band: 62-82 · straddles the Advance (75) line

Risk tier: **Medium**

1. Disposition

Advance: strong evidenced fit for the ED profile with Columbus advocacy, nonprofit leadership, and fiscal stewardship all backed by specifics, no Critical flags, and the main gaps (direct charitable-clinic healthcare context and statewide data-trend work) are Probe-level, not disqualifiers.

2. Fit Score

Dimension	Weight	Score
Required Skills / Tools	30%	74/100
Domain & Industry	25%	58/100
Seniority & Scope	20%	82/100
Preferred / Nice-to-Have	10%	70/100
Communication & Executive Presence	15%	82/100

What carries this is a real match on the leadership spine of the role. She sits in Columbus, currently runs a 501(c)(6) association ED seat, and her advocacy work is concrete: Advocacy Day, a Senate Health Committee hearing, and an NPA advocacy award she names by year. Fiscal stewardship, board governance, and network leadership are all evidenced with specifics, not adjectives. Seniority is arguably above the bar. Where it drags is domain. Riverbend serves free and charitable clinics for underserved patients, and her healthcare exposure is through professional societies (licensed practitioners, a dental society), not direct safety-net care delivery. Her most direct underserved-care example is a pro-bono dental program for uninsured patients, real but adjacent. The JD's "data savvy to identify future trends" has thin direct evidence. Nothing here reads fabricated. The question for the interview is domain translation, not credibility.

3. Requirement Coverage Matrix

Requirement	Status	Evidence
Columbus advocacy experience	● Met	Awarded the 2026 National Advocacy Excellence Award via government relations, member mobilization, attendance at 40+ fundraisers, coordination of Advocacy Day, and testimony before Ohio Senate Health Committee.
Healthcare environment understanding	○ Partial	Independent 501(c)(6) professional society representing Ohio licensed practitioners and students
Network engagement facilitation	● Met	Expanded membership network to 105 chapters in 10 countries via establishment of 10 student and three alumni chapters, stabilized retention rates over five years, and maximized industry exposure through events.
7+ years leadership experience	● Met	COVENTRY DENTAL SOCIETY INTERNATIONAL • REMOTE 2011 - 2024 ... EXECUTIVE DIRECTOR
Nonprofit leadership experience	● Met	Delivered executive leadership by stabilizing operations, emphasizing governance, and advancing 4,000-member mission of dental professionalism and global oral care.
Fiscal management ability	● Met	Manage \$1.5M foundation portfolio via partnership with trustees and legal counsel.

Resume Credibility

Executive Director · Candidate Audits

Requirement	Status	Evidence
Philanthropic fundraising experience	● Met	Generated \$2.7M in philanthropic impact by steering partnerships with a national dental-supply foundation, mobilizing 500+ dentist members to treat 1,500 uninsured patients, and administering \$200K in funding.
Relevant academic degree/certification	● Met	Master of Business Administration • Ridgeline University ... Certified Association Executive • National Council of Association Executives
Lobbyist/networker background	● Met	Secured high-level government access by partnering with lobbying consultant, arranging trade meetings with Department of Commerce, US Trade Representative, Customs and Border Patrol, and Consumer Product Safety Commission stakeholders.
Data trend analysis	? Unverifiable	
Statewide travel willingness	🕒 Partial	I am eager to travel across the state, connect with Riverbend member clinics, and be the visible, trusted face of this collaborative.
Healthcare business acumen	🕒 Partial	Manage \$1.5M foundation portfolio via partnership with trustees and legal counsel.
Empathy for marginalized communities	🕒 Partial	I helped create and supervise a pro-bono dental program for uninsured patients and nurtured a public-private partnership with a Fortune 500 company, deepening my commitment to serving those most often left behind.
Social issues thought leadership	🕒 Partial	NCAE Executive Management Section Council, Chair, 2021-22; Member, 2019-2023

4. Trajectory Fit

Lateral. This is a sitting Executive Director moving to another Executive Director seat, so the level lines up cleanly. If anything the scope she describes now (four affiliated entities, a \$1.5M foundation, a PAC) reads at or above a three-person, \$3M org. That raises the honest question of why the move. It may be domain pull toward mission work, or it may be a fit issue at the current org she is not naming. Worth one direct, neutral probe. The self-claimed trajectory holds up: her titles track her tenure and scope, no inflation tell in the arc itself.

5. Verifiable vs Unverifiable Split

This is where a reference call earns its keep.

Verifiable	Unverifiable
Executive Director, Ohio Practitioners Association, Columbus, OH, 2024 to present	Manage \$1.5M foundation portfolio
Executive Director, Coventry Dental Society International, remote, 2011 to 2024	Lowered legal liability by 50% through negotiated settlement of wrongful termination lawsuit
Senior Director of Membership, American Apparel Trade Council, Washington DC, 2010 to 2011	Generated \$2.7M in philanthropic impact ... mobilizing 500+ dentist members to treat 1,500 uninsured patients, and administering \$200K in funding
Master of Business Administration, Ridgeline University	slashing accounting costs by 30%
Bachelor of Arts, Allegheny State University	reducing marketing expenses by 40%
Certified Association Executive, National Council of Association Executives	Increased member retention by 12%
2026 National Advocacy Excellence Award	Expanded membership network to 105 chapters in 10 countries
2018 Dental Education Leadership Award and 2019 Association Impact Silver Award	Delivered eight profitable meetings for 250-300 participants
Testimony before Ohio Senate Health Committee / Senate Health Committee hearing	created \$20K foundation-funded emerging-leaders retreat for 50 young and established leaders
NCAE Credentialing Provider Committee, Chair 2024-2025;	operational oversight of 250 attendees

Verifiable

Unverifiable

Executive Management Section Council, Chair 2021-22

Columbus, OH location

6. AI-Authorship Read

Moderate signals of AI authorship or heavy AI assistance

- **Repeated result-verb-first bullet cadence with near-identical structure across many bullets**

Optimized financial oversight by overhauling reporting systems, streamlining monthly reconciliations, preparing IRS 990 filings, and leading transition to CRM platform, reducing marketing expenses by 40%.

- **Three-item parallel phrasing repeated as a structural habit**

optimizing people, processes, and resources to achieve measurable outcomes.

- **Uniform polish with abstract framing in the summary, little texture**

Trusted collaborator within multiple environments with ability to guide mission-driven organizations toward sustainable long-term impact.

- **Banned/marketing vocabulary consistent with AI-assisted drafting**

Established trusted executive presence by rebuilding external relationships with partners, demonstrating commitment, analyzing organizational operations, and spearheading multiple business units and affiliated boards.

- **Em-dash density (5 dashes)**

ION • COLUMBUS, OH 2024 - PRESENT Independent 50

- **Gerund-stacked bullets (3+ in a row)**

Marketing Manager • Capital Media Group • Rockville, MD

- **Three-item parallel list**

ions through strategic modernization, organizational growth, and operational excellence. Instrumenta

The prose is smooth and patterned, which points to at least AI assistance in drafting. That is common and not disqualifying. It matters here because polish can smooth over thin spots, so weight the verifiable/unverifiable split and the metric probes more than the wording when you decide.

Cover Letter Read

Strong grasp of the role's scope and intent

This letter reads like someone who actually studied the posting. It names the org's specific ask (connector, empathetic advocate, humble servant-leader), maps her OPA turnaround to Riverbend's moment, and speaks directly to the \$3M budget and the 59 network organizations. The advocacy paragraph is the strongest, concrete Columbus statehouse work rather than a mission recital. It does mirror the JD's language in places, so test in interview whether that is real fit or careful mirroring, especially on the underserved-populations framing where her direct experience is thinner than the letter implies.

- **Voice vs resume:** Consistent with the resume: same executive register, same emphasis on governance, advocacy, and fiscal stewardship. No jarring shift that would suggest a different author.
- **Communication:** Clear, well structured, persuades through specifics (Advocacy Day, Senate hearing, named award, \$1.5M foundation) more than buzzwords. Strong executive and stakeholder presence on the page.

7. Inflation Flags

Critical

No critical flags.

Material

Generated \$2.7M in philanthropic impact by steering partnerships with a national dental-supply foundation, mobilizing 500+ dentist members to treat 1,500 uninsured patients, and administering \$200K in funding.

Large impact figure that mixes an in-kind service value (\$2.7M) with a separate cash figure (\$200K administered), and 'impact' is not a defined dollar basis. The named partner and volunteer counts give it plausibility, but the headline number's derivation is unstated.

Lowered legal liability by 50% through negotiated settlement of wrongful termination lawsuit, and raised board confidence by managing attorney communication, conducting research, and giving strategic guidance.

A 50% liability reduction implies a baseline exposure number that is not given, and settlement outcomes are typically counsel-driven; the solo framing may overstate her individual role. Probe the mechanism and who else was involved.

Cosmetic

Grew program funding by restructuring business model, centralizing accounting, investment, facility, and technology services via outsourced vendors, slashing accounting costs by 30%, and creating investment policy.

Round percentage without a stated dollar baseline, but paired with a named mechanism (outsourcing/centralization), so credibility is reasonable. Low weight.

Material, dropped to Cosmetic: line names the outsourcing/centralization mechanism behind the 30%.

Optimized financial oversight by overhauling reporting systems, streamlining monthly reconciliations, preparing IRS 990 filings, and leading transition to CRM platform, reducing marketing expenses by 40%. The 40% marketing reduction is loosely tied to a CRM transition; plausible but the causal link between a CRM move and marketing spend is thin. Minor.

spearheading multiple business units and affiliated boards.

Buzzword phrasing ('spearheading') and vague scope ('multiple') in an otherwise specific document. Note only, low weight.

8. ATS-Gaming Scan

Reads as honestly formatted for ATS, not gamed.

9. Consistency Scan

- The Advocacy Day timing is described differently across documents; the resume implies award-linked Advocacy Day coordination while the cover letter dates the revitalized Advocacy Day to October 2025. Not a contradiction on its face, but confirm the sequence and dates so the advocacy narrative is airtight.

coordination of Advocacy Day, and testimony before Ohio Senate Health Committee.

revitalizing the Ohio Advocacy Day in October 2025, which secured a Senate Health Committee hearing

- Entity count differs between resume and cover letter: resume says four affiliated entities, cover letter says five affiliated organizations including a PAC. Likely a counting boundary (whether OPA itself is included), but worth one clarifying question.

Direct contractor network and four affiliated entities with separate tax IDs and bank accounts

Directing five affiliated organizations supporting the Ohio licensed-practitioner community while stewarding a \$1.5M foundation

10. Interview Probes

1. [Material - \$2.7M philanthropic impact claim] Walk me through how you arrived at the \$2.7M philanthropic impact figure. What was counted in it, what portion was in-kind versus cash, and what was your specific role versus the partner's and the volunteers'?

2. [Material - 50% legal liability reduction claim] Tell me about the wrongful termination matter. What was the exposure at the outset, how was the 50% reduction measured, and what did you personally do versus outside counsel?

11. Verify First

1. Confirm the CAE credential in the NCAE directory and the MBA/BA with the registrars. (Relevant academic degree/certification coverage · Under 10 minutes for CAE; 1-2 days for registrar/degree confirmation)

2. Verify the 2026 NPA Organizational Excellence in Advocacy Award and the Ohio Senate Health Committee hearing via NPA announcements and the Ohio Senate committee record. (Columbus advocacy experience (Met) and Advocacy Day timing consistency finding · 15-30 minutes online)

3. Ask the OPA board chair or trustees to confirm the \$1.5M foundation oversight, the entity count (four vs five), and her role in the settlement outcome. (Material - 50% liability claim and the affiliated-entity count consistency finding · One reference call)

4. Ask the former Coventry Dental manager or a national dental-supply foundation contact to confirm the \$2.7M impact program scope and her role. (Material - \$2.7M philanthropic impact claim · One reference call)

How to read this report

How to read this report: it is a probabilistic advisory tool, signals not verdicts. It scores what the candidate claims against the evidence in the documents against this specific job description, and nothing else. It makes no inference about any protected characteristic. Treat the two Material flags as interview probes, not conclusions, and use the verify-first list to close them fast. The real decision here is domain translation, so spend your call time on how her association and advocacy track maps to free and charitable clinic work.