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## **Success Story: Strategic Hire for a Mission-Critical Leadership Role**

A long-standing higher education client faced a pivotal leadership transition. The incumbent of a critical institutional research role — someone who had been with the college for nearly three decades — was preparing for retirement. Over the years, he had grown with the institution and significantly evolved the role, becoming a trusted advisor to senior leadership and a guardian of institutional knowledge.

With less than a year to plan the transition, the stakes were high. The role was central to data reporting, strategy, and compliance — especially with a major systems conversion already underway. The team was understaffed, the environment was fast-paced, and the institutional culture demanded someone who could balance strong leadership with collaboration, emotional intelligence, and institutional savvy.

This hire wasn't just important — it was career-defining for the senior executive hiring. Adding to the complexity, the client's go-to search firm lacked expertise in institutional research and couldn't deliver the specialized talent needed. RFPs and drawn-out processes weren't feasible.

That's where **Cizek Associates Inc. (CAI)** stepped in. With deep experience in institutional research searches and an understanding of both the technical and cultural demands of the role, we quickly gained the client's confidence. As an E&I member, the client was able to bypass a lengthy RFP process, allowing us to engage immediately under pre-negotiated terms.

We delivered a diverse and qualified slate of candidates. The committee advanced three strong finalists — each fully capable of succeeding in the role and aligning with the institution's culture. In the end, they not only made a stellar hire, but did so with confidence, clarity, and choice — more than they thought possible at the outset.

### **Outcome:**

- Critical hire made on time, with full leadership buy-in.
- Seamless knowledge transfer through a six-month shadowing plan.
- Strengthened partnership and trust with CAI for future searches.
- A career-defining moment delivered — with excellence.

**#1a (same client – different format)**

**Case Study: Delivering a Critical Leadership Hire in Higher Education**

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**Client Challenge:** A long-standing higher education institution was preparing for the retirement of a deeply respected leader who had led the Office of Institutional Research for nearly 30 years. His role had evolved alongside the institution’s growth, and much of his knowledge was undocumented. The position demanded technical expertise, strategic leadership, and cultural fluency with the institution's senior leadership. Complicating matters, a large-scale data systems conversion was already underway, and the department was slightly understaffed.

The Senior Vice President overseeing the hire knew this would be a career-defining moment. Hiring the wrong person would carry real consequences for leadership, data accuracy, and institutional momentum. The client’s existing search partner lacked expertise in institutional research, and the prospect of issuing an RFP threatened to delay the process beyond a feasible timeline.

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**CAI’s Solution:** Cizek Associates Inc. (CAI) was brought in for our deep experience leading searches in the institutional research space. After a brief vetting conversation, the client was reassured by our specialized expertise and high-touch process. Because the institution was a member of E&I Cooperative Services, we were able to bypass the time-consuming RFP process, allowing for immediate engagement under pre-approved terms.

We worked closely with the hiring executive to understand the full scope of the role, the cultural dynamics, and the ideal profile needed to succeed. We also designed a transition strategy to ensure a six-month overlap with the outgoing leader, preserving institutional knowledge and smoothing onboarding.

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**Results:**

- Delivered a diverse and highly qualified candidate slate within the desired timeline.
  - Three finalists were unanimously advanced by the search committee, all seen as capable of succeeding in the role.
  - The final hire brought not only the right experience and leadership skills but also the collaborative style and sense of humor that made them a natural cultural fit.
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- A structured shadowing plan ensured critical knowledge transfer from the retiring incumbent.
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**Impact:**

- Mission-critical leadership transition executed on time and with confidence.
- Strengthened trust and partnership with CAI for future strategic searches.
- A major professional win for the hiring SVP — and a lasting leadership solution for the institution.

**CAI brings strategic rigor, true partnership, and an obsession with leadership fit** — while many competitors are just filling a seat.

#2

## Success Story: Sticking With It — From Search Challenge to Cultural Fit

### Client Challenge:

A rural higher education institution urgently needed to fill a leadership role in Human Resources. They faced multiple challenges: the role required a full-time, in-person presence in a remote location, the compensation was below market, and the incumbent had exited abruptly, leaving a critical operational gap. The institution didn't realize they were eligible to engage CAI through their E&I Cooperative membership — a discovery that allowed us to move forward immediately, bypassing procurement delays.

### Our Approach:

From the start, we approached the engagement as a **collaborative problem-solving partnership** — not just a search transaction. We brought deep experience supporting rural institutions and encouraged the client to remain open to evolving the role based on real-time market insights.

After early outreach and candidate conversations, we confirmed several realities:

- The compensation level was too low to incentivize relocation.
- The area had limited appeal to out-of-county professionals.
- Talented HR professionals *were* available — but preferred remote or contract options.

### Collaborative Pivot:

We recommended that the client temporarily fill the gap with a vetted, remote HR contractor — someone we had already identified through our early search efforts. The client agreed, and within a week, a 20-hour/week remote professional was in place, easing the pressure and keeping HR operations moving forward.

Meanwhile, we worked alongside the client and their board to:

- Adjust the salary range and relocation package to be more competitive.
- Loosen certain requirements (e.g., higher education experience became “preferred” rather than “required”).
- Continue the full-time search with a more realistic and inclusive candidate profile.

### Outcome:

After a **nine-month journey** — longer than a standard search, but guided with consistency and care — we helped the institution hire a full-time, **local, in-person** HR leader. The selected candidate not only met the professional requirements, but also brought a personal connection to

the institution: she had once attended the college herself and remained a passionate advocate for its mission.

**Impact:**

- Interim needs covered by a trusted professional — without compromising quality.
  - Long-term hire made with full stakeholder alignment.
  - Cultural alignment and geographic presence achieved — a rare win in a tight labor market.
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**At CAI, we don't quit when the road gets long.**

**We stay with you — flex, adapt, and solve — until the right leader is in place.** Because at the end of the day, **skills are relatively easy to find — but the *right fit* is where the magic happens.**