**Reference Check Outline Worksheet**

**Pre-work: Identify outstanding must-haves**

List the must-haves for the position you’re filling below. Cross off the qualities you’re convinced the candidate has demonstrated through interviews and application exercises. Focus your reference checks on the remaining qualities.

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**Introduction & Context**

Give the reference person context about your organization and the role you’re hiring for.

1. Describe your organization—its size, mission, strategy, and key programs or issue areas.
2. Describe the position and its must-haves—job responsibilities, level of seniority, specific skills or experience that you are looking for. Share why you are hiring to fill this position.

**Overall questions**

Ask questions to get an overall understanding of the candidate and how they’ve worked with the reference. Start with “easy chewing” questions to get your reference comfortable. Some questions you might ask here:

* How long did you work with the candidate? In what capacity? What were the circumstances of their departure?
* What was it like to work with the candidate?
* What are the candidate’s greatest strengths? Based on what I describe about the role, what parts of the job do you think the candidate would be most successful at? *(Try to get the reference to name at least two.)*
* If you had to pick out two pieces of the job where you think the candidate might not be as strong or might need some development, what would those be?

**Role-specific traits and skills**

Think about the must-have skills for this role. Select the skills from your must-haves list that you still feel uncertain about or haven’t been able to test for as much in the hiring process thus far. Ask questions to probe for experience in those areas. Below are some prompts to get you started, but we encourage you to get even more specific. Feel free to refer to the last section of this toolkit for sample questions.

* One skill that’s very important for this role is \_\_\_\_. Can you talk about a time during your work together that the candidate demonstrated this skill?
* A big part of the job is being able to \_\_\_\_. Have you seen the candidate handle this situation? How well do you think they navigated it? What was their approach? What went well? What could have been better?
* At [name of your organization], we really value \_\_\_\_. How have you seen the candidate demonstrate this value in your work together?

**Wrap Up**

Wrap up with some more general questions to give the reference a chance to share their overall opinions about the candidate’s fit for the role.

* If you could hire them again, what kind of job would you hire them for? What would you not hire them for?
* Overall, how would you rate the candidate’s likelihood of success in this role? As their manager, what would I need to know to help them be successful?
* Is there anything else you would want to know about the candidate if you were in my shoes?

**Sample Reference Check Outline**

# **Introduction**

I’m the Legislative Director at State Health Care Now. Thanks for agreeing to speak with me about your experience working with Avery. Before we start, I’d like to give you a quick overview of our organization and the position we are considering Avery for. We’re a 20-person advocacy organization committed to enacting universal health coverage legislation in the state. The organization is growing, and Avery is a finalist for our new State Policy Director position. This director must be a pro at 1) juggling a lot of projects without dropping any balls; 2) working with a racially diverse group of partners and building alliances among them; 3) working in a fast-paced environment and getting results. There are other requirements, but these are the must-haves.

# **Overall Strengths And Weaknesses**

* How long did you work with Avery? In what capacity? What were the circumstances of their departure?
* What was it like to work with them?
* What parts of the job sound most like something Avery might succeed in?
* Can you describe their greatest strengths? What words come to mind in describing them?
* Based on what I described, what are two areas where you think they’d need help?
* When Avery worked with you in their capacity as \_\_\_\_, how would you rate them among their peers who did similar work? For example, were they average? Pretty good? Best ever?

# **Role-Specific Traits and Skills**

* Tell me about a time when Avery had to stay on top of a large volume of work in a fast-paced environment. How did they handle it? What was their approach? What did they do well, and what could have been better?
* One skill that’s very important for this role is being able to build alliances across lots of different stakeholders from different backgrounds and identities. Can you talk about a time when Avery demonstrated this skill?
* To be successful in this role, we need someone who is exemplary at bringing a racial equity lens to their work. In this case, that means being able to 1) understand how racism, classism, and other forms of oppression intersect with our issue and impact the communities that we and our coalition partners work with; 2) communicate and manage effectively across lines of difference and power; 3) recognize how their identities and background influence how they show up to their work and relationships. Do you have any evidence that Avery is able to do these things?

# **Wrap-up**

* If you were in the position to hire Avery again, what kind of role would you hire them for? What kind of job would you not hire them for? Why?
* What should I know about Avery in order to manage them effectively? What do they need from their manager to be successful?
* Is there anything else you would want to know about Avery if you were in my shoes?

**Sample Reference Check Questions**

Draw from the following list to brainstorm questions for references. In addition to discussing overall impressions of the candidate (Y), you should probe about specific must-have qualities that you’re still unsure about or haven’t gotten to test as much in the hiring process. Make it easier for references to talk about the candidate’s downsides by asking bounded questions or posing neutral options where there is no “bad” choice.

**General Questions**

* How long did you work with the candidate? In what capacity? What were the circumstances of their departure?
* [After describing the position you’re filling and the key traits you need] What parts of that sound most like something Y might succeed at? If you had to pick two pieces where you think Y might not be as strong, what would those be?
* What was it like to work with the candidate?
* What do you think Y’s coworkers would say are Y’s greatest strengths? What would they say Y needs to work on?
* What was Y’s greatest achievement in their work with you?
* Tell me about a time when you were not entirely thrilled with Y’s performance.
* In my experience, I’ve seen some people who are more like A, and some who are more like B—which would you say Y is? (For example, “In my experience, I’ve seen some people who are highly detail-oriented while others are more ideas- and vision-focused. Which of these sounds more like Y?)
* In the time that you’ve worked with/known the candidate, in what areas have you seen the most growth? Can you point to specific steps they took to grow their skills?
* When Y worked with you in their capacity as \_\_\_\_, how would you rate them among their peers who did similar work? For example, were they average? Pretty good? Best ever?
* Overall, how would you rate Y’s performance?
* How would you describe Y’s communication style?
* (If they were a manager) How would you describe Y’s management style? What words come to mind when you think about their leadership?

**Specific Questions**

* Tell me about a time when Y…
	+ was faced with a difficult challenge
	+ went above and beyond to get a result
	+ persisted despite obstacles
	+ gave up or almost gave up
	+ had to put their ideas into writing
	+ had to deliver an important speech
	+ had to move a group to action (within the organization or outside the organization)
	+ successfully navigated issues of power, privilege, and oppression in their work
	+ improved a system, process, or structure to advance racial equity and inclusion on their team or organization
	+ came up with a new approach for tackling a problem
	+ came up with a strategy for how to get to a particular outcome
	+ had to stay on top of a large volume of work/had to multi-task
	+ had to explain complex ideas in a simple way
	+ had to motivate someone to do something
	+ had to share tough feedback across lines of difference and power

Follow-up questions for the above: What happened? What was the result? What went well? What could have been better? How did they approach it?

* To be successful in this role, we need someone who is exemplary at bringing a racial equity lens to their work. Can you provide one or two examples of a time that X was able to do this? *(Note: without being confident that the reference has a high bar for racial equity and inclusion competency that is aligned with your organization’s, it can be tricky to ask them questions to assess your candidate’s REI competency. Do this carefully.)*
* One skill that’s very important for this role is \_\_\_\_. Can you talk about a time during your work together that the candidate demonstrated this skill?
* A big part of the job is being able to \_\_\_\_. Have you seen the candidate handle this situation? How well do you think they navigated it? What was their approach? What went well? What could have been better?
* At [name of your organization], we really value \_\_\_\_. How have you seen the candidate demonstrate this value in your work together?

**Wrap-up Questions**

* If you were thinking of hiring again for Y’s position, how would you describe your reaction if Y applied: would not hire, would consider hiring, would definitely hire, would move earth and moon to lure Y back?
* If you were in the position to hire Y again, what kind of role would you hire them for? What kind of job would you not hire them for? Why?
* If we imagine that it’s six months from now and I’ve hired Y but it’s not working out, why do you think that would be?
* What should I know about Y in order to manage Y effectively? What would they need from their manager to be successful?
* Is there anything else you would want to know if you were in my shoes?
* Can I come back to you if I think of other questions?