

Appendix 2
Tips for the Reference Checker

Structured Reference Checks Tips for the Reference Checker

Calling the referee to make an appointment for the interview

- Inform the referee whether the interview will be conducted over the phone or in person.
- Ensure that the referee allocates enough time to address each of the interview questions. You may want to estimate about 7-10 minutes for competency-based questions, plus additional time for preliminary and verification questions.
- Ask the referee to review the interview instructions, the reference checking form and other preparatory documents in advance.
- Encourage the referee to prepare so that they can provide concrete examples of how the applicant has demonstrated the competencies that are identified in the reference checking form. Discussing one or two examples that integrate many, if not all, of the behaviours for each competency is appropriate.
- Inform the referee that the reference check data is protected; however, it is not confidential - the applicant can ask for and review the provided comments.
- Send the Reference Checking Form to the referee.

Initiating the discussion

- Introduce yourself and the purpose of the interview; make sure that it is a good time for the referee to proceed. Reschedule if necessary.
- Ensure that the referee received the preparatory documentation and has reviewed it. You may want to offer to reschedule if this is not the case.
- Introduce the steps that are required to complete the Reference Checking Form and the amount of time that the discussion will take.
- Remind the referee to provide facts, concrete descriptions, relevant incidents and behavioural examples, rather than opinions.
- Ask if the referee has questions about the process.

If referees refuse to participate

- Remind the referee that the reference check is only one of several assessment tools that will be used to determine the most suitable applicant for the position.
- Inform the referee that the applicant has authorized the reference checking process.
- Explain to the referee that they will not be stating an official position for their organization.

Conducting the interview

- Take detailed notes on the referee's examples and comments, as close to verbatim as possible.
- Follow the structured interview format to ensure that the same questions are asked about each applicant to ensure that all applicants are treated equitably.
- Focus on job-relevant behaviours that demonstrate the competencies.
- Use probing questions as required. Ask "Can you tell me more about that?" when more detailed information is required, or if the referee responds with a generalization or evaluation, ask "Can you give me a specific example?"
- Ensure that the assessment of overall suitability is supported by concrete examples or facts, explaining why the applicant would be a good fit for the job or not.
- Ask the referee for additional comments and take this opportunity to ask for clarification, as required.
- Ask referee to destroy their copy of the Reference Check Form once the interview is completed. It is particularly important to do so if their copy of the form contains information or notes relating to the applicant.
- Thank the referee for their time and cooperation and ask whether you can call back if you have additional questions.
- Don't forget to note your own additional comments.

Assessing the competencies

- Proceed with the assessment only once the interview is over.
- Assess each competency separately, one at a time.
- Review the competency definition and behavioral indicators that you are about to assess.
- Review all of the information that has been collected for a given competency and assess it in relation to the behavioural indicators.
- Justify your assessment based on the concrete behaviors that have been observed.
- Avoid relying on subjective generalizations.
- Should you realize that you are being inconsistent in your assessment from one reference check to another, review all your assessments and make adjustments accordingly.
- Be aware of assessor's biases and takes steps to minimize them wherever possible.