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**Referee Check - Template**

Referee checks are an important part of the recruitment process. They provide the hiring manager with the opportunity to obtain independent information about an applicant’s capabilities. They also help to ensure the applicant has the cultural fit, ability, experience and skills required for the role.

Referee checks for the preferred applicant or applicants are best done in the final stage of the recruitment process. Where possible, it is generally preferred for referees to have known the applicant for a reasonable amount of time and have knowledge of their work performance.

It is important that inclusive recruitment processes are applied to the referee check process. While referees are usually the applicant’s past or current employers, they can also be anyone who is able to provide details about the applicant’s character and suitability for the position.

It is important to be aware that some applicants may not be able to provide professional referee details for a variety of reasons such as: being new to the workforce or returning after some time away, being new to the country, having negative experiences in previous workplaces, etc.

**Tips to ensure your referee check process is inclusive:**

* If an applicant is not able to provide professional referees, give them the option of providing either an academic referee (e.g. a past teacher or lecturer) or a personal/character referee. A personal/character referee could include a neighbour, parent of a close friend, community leader, community worker, church minister, etc.
* Don’t ask applicants for referee details in the initial application process. Instead, let them know that referee details may be requested at a later date (e.g. at the interviewing stage).
* Let applicants know in advance that you would like to contact their referees. This allows applicants to let their referees know about the role and for the referee to prepare.
* Don’t request for a referee to be a current employer, as you may exclude potential applicants from applying. Some applicants may not want their current employer to know that they are applying for another job.

**Making contact with a referee:**

* Think about the best time to contact a referee.
* You might like to make initial contact with the referee via phone/email to:
	+ introduce yourself and let them know why you are contacting them, and who provided you with their details (name of applicant)
	+ let them know what information you’d like to obtain during the referee check (consider providing them the questions in advance)
	+ determine how they’d like to provide the information (allow referees to provide information in whichever way they are most comfortable with. This could be via a phone conversation, email, meeting face-to-face, or by completing a short form)
	+ determine a suitable time to conduct the referee check. If the referee requests a phone call or meeting, make sure you let them know approximately how long it will take. By scheduling a specific time to conduct the referee check, this will give the referee time to think about what they might like to say.
* During the referee check, explain to the referee the position the applicant has applied for and the responsibilities it involves.
* Let the referee know that the information they share may be passed on to the applicant if requested.

This referee check template should be customised to suit both the advertised role and the applicant. This template includes examples of questions that you can ask either a professional referee or a personal/character referee.

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| **Person conducting referee conversation:**  |  | **Date:** |  |
| **Name of applicant:** |  | **Position applied for:** |  |
| **Referee name and position:** |  | **Phone and/or email of referee:** |  |

**Professional referee question examples**

1. In what capacity is the applicant known to you? (Determine if they are a professional referee or a personal/character referee.)

2. What period of time have you worked with the applicant and how recent is your knowledge of the applicant’s work performance?

3. What was the applicant’s position?

4. What was your position? Did the applicant report directly to you?

5. What were the applicant’s key responsibilities when they reported to you / worked with you?

6. How would you summarise the applicant’s work performance in general?

7. What are the applicant’s strengths?

8. Pick some key competencies required for the job and frame a question around these. Key competencies could be:

• ability to take initiative

• reliability and punctuality

• social skills

• organisational skills / ability to meet deadlines.

For example, a question could be “how does the applicant respond to pressure?” or “how would you describe the applicant’s ability to handle their caseload?”.

9. Have there been any poor performance/disciplinary issues that needed to be managed? If so, what were these and what was the outcome?

10. What do you consider the applicant’s development areas to be?

11. Would you re-employ the applicant? Why/why not?

12. Does the applicant contribute positively to the work environment? If so, in what ways?

**Personal/character referee question examples**

1. In what capacity is the applicant known to you? (Determine if they are a professional referee or a personal/character referee.)

2. (If relevant) Could you tell me a bit about the applicant’s work history? What roles have they worked in and how do you think they performed?

3. What skills does the applicant have that would make them a good fit for this role?

4. Can you recall a time when the applicant had to deal with a challenging or stressful situation? How did they handle it?

5. What are the applicant’s strengths?

6. Does the applicant work well in a team/with others?

7. What is an accomplishment you’ve seen the applicant achieve that they would be proud of?

8. Can you comment on the applicant’s:

• reliability and punctuality

• ability to communicate with others

• ability to solve problems

• add competencies relevant to the role that a personal/character referee would be able to comment on.

9. Are there any areas that you think the applicant requires further development or training in?