Reference Check Template

Requisition #:	Applicant Name:	Date:
Conducted by:	Reference Name & Phone:	Organization:

Script:

Hi, My name is _____ and I'm calling to conduct a reference check for (*applicant name*), who is being considered for the position of (position title, branch and ministry). Your name has been provided by *(applicant name)* as a reference. The reference check will take approximately 20 minutes to complete. This reference will be used in the overall evaluation of the applicant and will affect the final rating. The information you provide can be given to the applicant, in full or part, should it be requested under the *Freedom of Information and Protection of Privacy Act*.

Tips:

- Briefly explain the responsibilities of the job and the key factors you will be assessing through the reference check.
- Listen carefully and keep detailed and comprehensive notes of the referee's comments.
- Do not try to evaluate the reference or complete the rating while gathering information; complete the rating after the call.
- Do not ask the referee to provide scores.
- Ratings should be assigned based on a thorough examination of the examples and evidence provided by the referee. Reference check rating can be narrative (i.e. meets/ doesn't meet) or numerical i.e. numerical rating scale.

Select the competencies, skills and abilities you want to assess. You may select factors and questions from the sample list below. Please ensure the factors you choose to assess are required for the optimal job performance.

Sample Skills	Sample Abilities	Sample Competencies
Communication Skills	Ability to multitask and handle high volume of work	Problem Solving & Judgement
Organizational Skills	Ability to meet deadlines	Holding People Accountable
Administrative Skills	Ability to deal with irate, upset, hostile people	Leadership
Computer Application Skills	Ability to exercise tact and diplomacy	Developing Others
Customer Service Skills	Attention to detail, high level of accuracy	Teamwork and Cooperation
Interpersonal Skills	Ability to manage programs/ projects	Service Orientation
Records Management Skills	Ability to lead staff	Fostering Trust
Sample questions		

- **Teamwork and Cooperation:** Please describe _____ ability to work in a team environment. Please describe applicants' ability to establish professional and effective relationships with colleagues, clients.
- **Relationship building:** Please describe _____ ability to establish and maintain professional (effective, respectful, collaborative) liaisons/relationships, with colleagues, clients and supervisor(s).
- **Communication Skills:** Please describe _____ability to communicate effectively - both verbally and in writing.(inter-personal, group settings, email, letters/memos, reports, presentation).
- **Organizational Skills:** Can you tell me about _____ organizational skills? Is he/she able to organize and manage their workload on consistent basis? Is he/she able to: meet deadlines; adapt to changing priorities, handle large volume of work?
- **Ability to Manage Stress/ Workload:** Please describe _____ ability to effectively cope with and manage through periods of high workload and/or workplace stress. What stress management and/or self-care abilities have you observed being demonstrated.
- **Leadership/ Supervisory Skills:** Please describe _____ leadership ability and provide an example. In what leadership areas is he/she very effective? What areas of leadership need further development? Describe how he/she addresses and deals with challenging employees. Provide an example of his/her success in managing employee performance.

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Rating:				
0-1 points - unacceptable	**2 points - less than acceptable**	**3 points - satisfactory**	**4 points – more than acceptable**	**5 points - exceptional**
Does not meet requirements	**Does not meet requirements**	**Meets requirements**	**Meets requirements**	**Meets requirements**
• Significantly below criteria required for successful job performance • Demonstrates counter-productive behaviours that have negative outcomes or consequences	• Insufficient for effective performance • Does not meet criteria for effective performance • Does not demonstrate a sufficient range of skills for handling the situation	• Acceptable for effective performance • Meets criteria for effective performance • Demonstrates a sufficient range of skills for handling the situation	• More than acceptable for effective performance • Consistently demonstrates better than average level of performance • Requires limited direction in complex situations	• Exceeds expectations in most to all areas with superior results • Requires limited direction in complex situations

Part 1: General Verification Questions		
Employment Relationship	Choose an item.	Notes:
In what capacity was the applicant employed by your organization?	Notes:	
What were the dates of employment?	Notes:	
In what capacity was the applicant employed by your organization?	Notes:	
Please describe the applicant's key functions:	Notes:	
What was the applicant's reason for leaving?	Notes:	
Part 2: Job Specific Questions - Knowledge, Skills, Abilities and Competencies		
Insert Factor Assessed: **Insert Question:**	Notes:	
	Score or Pass/Fail:	
Insert Factor Assessed: **Insert Question:**	Notes:	
	Score or Pass/Fail:	
Insert Factor Assessed: **Insert Question:**	Notes:	
	Score or Pass/Fail:	
Part 3: Overall Performance Questions		

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Overall Performance • What would you describe as the applicant's key strengths? • Have there been any issues or performance concerns with this individual? If yes, please explain when were these issues identified? When were they discussed with the individual? What development is underway to achieve improvement? What is the progress?	Notes: Score or Pass/Fail:
Reliability – Punctuality & Attendance • Did applicant attend work on a regular and consistent basis? • Did applicant arrive to work on time on a regular and consistent basis? • Have there been any lateness or absence concerns? Did you discuss these issues or concerns with the individual? If yes, did you discuss these concerns with the employee? If yes, did improvement result?	Notes: Score or Pass/Fail:
Standards of Conduct: • Did applicants' conduct meet the standards in matters such confidentiality, loyalty, honesty, integrity, impartiality, workplace behaviour and conflicts of interest? • If there were any issues or concerns please explain. Did you discuss these issues or concerns with the individual? If yes, did improvement result?	Notes: Score or Pass/Fail:
Part 4: In closing	
• Is there anything else of relevance that I have not asked you that you think I should know about this individual's performance at work? Any comments you wish to add?	Notes:
• Would you rehire this individual? Why, or why not?	Notes:
Thank the referee for their time and cooperation and ask for permission to call back with any additional questions.	

Overall Rating Summary (only include factors that were assessed)	Score	Pass/Fail
Insert Factor:		
Insert Factor:		
Insert Factor:		
Overall Performance		
Reliability- Punctuality & Attendance		
Standards of Conduct		
Total Available Points and Minimum Pass Mark (if applicable)		
Applicant Score (if applicable)		
Overall Pass/ Fail Rating		Choose an item.