

Best Practices for Conducting Reference Checks

1. **The search committee should determine who should conduct the reference checks.** Ideally, the same person will conduct all the reference checks.
2. **Do not contact a candidate's current employer/supervisor without prior discussion with the candidate.** If the candidate is internal to the University, consult with your unit's HR representative. If the candidate does not want you to contact the current employer/supervisor, make it clear that if the person is the chosen candidate, contact with the current employer/supervisor may occur prior to the offer being extended.
3. **Develop a set of standard reference checking questions in advance** and ask the same questions of all references.
4. **A minimum of three references is recommended.** It is recommended that at least one of these references is a current or former supervisor. Ask candidates to provide a range of references (supervising faculty, peers, former/current students, etc.). Seeking input from individuals who are not on the list provided by the candidate is appropriate; however, you must obtain the candidate's permission to seek feedback from others.
5. **Reference checks are typically conducted by phone, but you may also seek letters of reference.** If conducting a reference check by phone, a sample evaluative reference document appears on the next page.
6. **Take notes on relevant information.** Carefully evaluate and assess the reference after the phone call.

Setting the tone for a reference check

- It is essential to set the right tone when speaking with references or you may not get the information you are seeking.
- Emphasize the value of having a reliable, candid reference.
- You might say something like, "I know, of course, that no candidate is perfect. However, as we make our decision, it is useful to know as much as possible about the candidate to determine whether they have a high chance of success in the job and so that we can provide appropriate support during the onboarding process."
- Begin by describing the job; be specific about the role you are trying to fill. Describe what success looks like in your unit and then ask how the candidate measures up.
- Keep questions aligned with the same competencies used to evaluate the candidate for the position and ask the same questions for each candidate.
- **Be attentive to your own biases as well as the potential biases of the person providing the reference.** Are you looking for specific traits, characteristics, or key words? Are these likely to be used regardless of the candidate? Research indicates that the language used to describe female candidates often focuses on soft skills and service-related functions rather than on competency-related functions, for example.

Sources:

Ensuring Equitable Searches for Faculty Positions, Affirmative Action Office, Penn State, 2022
Reference Check Guide, Office of Human Resources, Penn State
UAB Reference Check Template



PennState
Faculty Affairs

Sample Questions for Reference Checks

Candidate Name _____

Position Applied For _____

Reference Name _____

Working Relationship to Candidate _____

Organization/Institution _____

Reference Checked by _____ Date _____

Introduction

This is _____. I am a member of the Search Committee for the [position name] at The Pennsylvania State University. [Candidate] is on the list of candidates from whom we will be making our final selection. [Candidate] has given us permission to contact references. Would you be willing to comment on their suitability for such a position? We would prefer that you keep [Candidate]'s candidacy confidential.

Sample General Questions

- What has been your relationship to the candidate and how long have you known [Candidate]?
- How would you view [Candidate's] qualifications in terms of the role a [name of position] should assume?
- How would you describe [Candidate's] overall performance and quality of work?
- How well does [Candidate] work with faculty and people from outside their immediate organization?
- What do you consider to be [Candidate's] greatest strengths? What areas do you have reservations about?
- How well did [Candidate] respond to pressure (e.g., from high volume, deadlines, crisis situations, etc.)?
- How did [Candidate] respond to criticism/interpersonal conflict?
- Penn State is an academically demanding, student-centered university with a strong commitment to diversity, equity, inclusion, and belonging. Can you speak to [Candidate's] commitment in this regard or any demonstrated efforts to support DEI&B at your institution?
- How would you judge [Candidate] as a leader?
- What substantive accomplishments are generally attributed to [Candidate]?
- Do you know of any qualities, incidents or experiences that might make [Candidate] unsuitable for this position?

Specific Skills and Experience

In addition to the above questions that address general performance areas common to most jobs, questions addressing specific duties of the particular position should be included here. For example, such questions might cover one or more of the following areas:

- ▶ Technical knowledge or skills applicable to this type of work
- ▶ Experience in the applicable position (teaching, research, clinical, etc.)
- ▶ Administrative skills if applicable

Questions might include:

- How well does [Candidate] interact with students?
- How would you describe [Candidate's] teaching and leadership skills?
- What research and/or grants are you aware of with which [Candidate] has been most recently involved?
- How did [Candidate] perform in a clinical setting? Did patients provide feedback on [Candidate]? If so, what kind of feedback?
- Provide an example of [Candidate's] academic accomplishments or scholarly work.
- How would you judge [Candidate's] academic qualities?
- How would you describe [Candidate's] knowledge of the discipline?

Conclusion

- Would you like to add anything else that we have not already addressed?
- Given the position I described, would you recommend [Candidate] for the position?
- If the reference is a current or previous supervisor: Would you hire this person again? Why or why not?
- Is there anyone else with whom you think we should talk with to help inform our understanding of this candidate's work or experience? (You must obtain the candidate's permission to speak with off-list references; see #4 above.)