Session 3 Ten Tips for Effective Reference Checking

1. Don't limit the references checked to the ones identified in a proposal

2. Instead, ask in the proposal for a list of recent religious institute clients and choose which ones to contact as a reference

3. Check references before interviews

4. When checking references, ask the religious institute to identify good questions to ask based on its experience with the individual or firm

5. Have more than one representative of the religious institute participate in reference checking phone calls

6. Prepare a list of important take-aways from reference checks to share with the proposal review team or institute decision-makers

7. Ask if the individual or firm demonstrated a good working knowledge about religious life

8. Probe into the comfort level of working and interpersonal relationships developed with the individual or firm

9. Inquire into demeanor, patience with and handling of questions and overall strength and clarity of communications skills

10. Get input on whether the individual or firm remained independent and objective while also sharing personal views and opinions from experience