

Optimizing Reference Interviews – the Three P’s:

Plan and Probe to Get a Rounded Picture

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If you manage a fundraising operation with one or more job openings, you’re probably spending more time than you’d like on referencing. At Lois L. Lindauer Searches we’ve conducted about 3000 interviews in the course of placing hundreds of fundraising professionals, and we’ve learned a thing or three about asking the right questions and listening beyond the given responses. Here are some of our insights into this essential piece of the hiring process.

Professional References Reduce Risks

Professional references are used to reduce hiring risks, assuring us of a candidate’s ability to succeed. A wrong hiring decision can derail your fundraising effort, lower morale and, in the very worst cases, result in legal action. But, at the same time, it is unrealistic to expect that any part of the hiring process -- from interviews to search committees to references -- will produce a hiring guarantee.

We recommend a 360-degree perspective to the reference process. You will always want to speak to a hiring manager. Speaking to a previous manager is perfectly fine. If the position calls for management, you’ll also want to talk to a direct report. If you have these nailed down, a colleague or peer interview will round out the picture for you. Each will have a unique perspective on the candidate.

What you ask will vary, depending on the working relationship of the reference to the candidate, but in general, all reference interviews should be geared to ascertain the technical skills required by the position and how the person interacted within the department.

If you are thinking of making calls “off his or her reference list,” ask the candidate if there is anyone you should not contact. It is reasonable for the candidate to ask you not to call his or her current boss as a reference until an offer is on the table.

Starting the Process

Create your reference questions to get information as to how the candidate measures-up to the technical requirements and the personal attributes required by the position. Somewhere along the line of reviewing your interview notes and re-evaluating his or her resume, you may have an *a-ha!* moment where you realize that there is one or more

questions that need clarifying or elaboration (or maybe there's a red flag that's nagging you).

The conversation will go best if the candidate has shared the job requirements with the reference in advance and told the reference that you will be calling. Before you call, set up a specific time for the interview and ask the reference to set aside about twenty minutes for the conversation. To eliminate any mis-communication, tell him or her that you will initiate the call. If you follow this process, the reference will know exactly what you're looking for and will be available to give you his or her focused attention.

At LLLS we find the best reference interview questions come from a blend of the old standbys: "Tell me about the candidate's principal strengths" with those tailored especially to the position you are filling.

For major gift officer references, we ask about candidates' effectiveness in re-engaging lapsed donors, whether or not they attained their visit and/or revenue goals, and what how they interacted with donors. For all management positions you'll want to know if the candidate was able to retain staff and to motivate them to achieve. Ask for examples wherever appropriate.

If you're looking for a polished, sophisticated frontline fundraiser to work with the board, a pointed question might be, "Tell me about the candidate's relationships with wealthy donors and/or high visibility corporate executives." Follow that up with, "How did the candidate build these relationships?"

"How did s/he get along with the others on the team?" "In the office?" "Would you consider him/her a team player?" "Can you give me an example of a time when s/he pitched in and went over and beyond to get a project completed on time?"

One of the toughest areas to get at relates to organizational interactions. Shape questions carefully using your own organization as a frame of reference. "This candidate has superior writing and analytic skills, but we have some demanding and critical program staff. How has the candidate handled working with difficult people?"

"Was there ever a time you had to speak to him/her about work style or behavior?"
"What was his/her reaction?"

If you have specific concerns about a candidate's potential fit, create respectfully-worded questions to get the answers you need. For instance, if you are considering a candidate



who is currently working in higher education and you are at a hospital you may have questions as to his/her ability to work in a role that doesn't have a built-in constituency.

Using open-ended questions whenever possible yields the most information. Check out the questions at the end of this article.

Given the many demands on your time, it is tempting to squeeze reference checks between meetings, during lunch, or by cell on your way to an appointment. References are a vital component of the hiring process and deserve your concentrated focus.

On The Call

Reference conversations call for you to listen with your third ear. Just because you can't see the person doesn't mean that you can't learn a lot from a reference's non-verbal communication. Excellent candidates often have references that are clearly enthusiastic about their qualifications and are willing and able to give you detailed examples of successful projects, events, or cultivation of donors and more.

On the other end of the spectrum are people who give one-word answers, which may indicate a problem. You need to follow up. For example, if you ask, "Does the candidate work well under pressure?" and you receive a less-than-convincing "yeah," your next question might be, "This is a role with many deadlines and aggressive goals. Can you tell me how the candidate responded in similar circumstances at your organization?"

Long pauses or sighs may be signs that the interview may not bode well for the candidate. Note what questions cause these reactions and come back to them from a different angle, if possible.

Be appreciative of the reference's time and cordially thank him or her.

After The Calls

Never discuss reference information with a candidate. If you hear something negative, say that over the course of the process, you've come up with additional questions and ask for another reference.

And take a moment to digest the reference information before you decide on a course of action that might end up by rejecting the candidate. Did a particular issue come up from more than one reference? How much of a negative was it? Again, you want to look at the whole candidate picture. If the negative comment casts a cloud over the potential



candidate's ability, at LLLS we include that comment in our write-up. As a result, sometimes the client wants to meet the candidate and sometimes, s/he doesn't.

Top Ten Reference Questions

1. Is s/he qualified for the position?
2. Did he/she attain his/her goals?
3. What impact has s/he had on your organization?
4. What are the candidate's three strongest qualities? (examples)
5. What would the candidate's critics about him/her
6. What advice would you give his/her manager to bring out his/her best work?
7. Is this candidate a team player?
8. Would you re-hire the candidate?
9. Should I hire this candidate?
10. Is there something I should have asked?

Top Issues to Avoid

Absolutely avoid any questions that concern:

- **Gender and Family** (including number of children, marital status, spouse's occupation or health coverage, age of children)
- **Race** (including any discussion of accent)
- **National origin/ancestry** (such as ethnic origin of surname, nationality of spouse, applicant's native language, or maiden name)
- **Religion** (affiliation, holidays observed, any attempt to gain religious information)
- **Age** (date of birth/high school graduation)
- **Disability** (if an applicant has a disability, nature or severity of disability, whether applicant has filed worker's compensation claim, past medical problems)
- **Veteran Status** (including discharge status or branch of service)

