**Guidance on Taking References**

This pack includes a sample email template you can use when requesting references, as well as the questions you might want to ask.

The information provided should remain confidential and used solely for recruitment purposes.  
  
It is often preferable to take references over the phone however if diaries don’t allow, it might be more practical to ask for a reference via email. Please find below emails that can be used in each scenario.

• Option 1: Request written feedback by email (referee replies in writing).  
• Option 2: Request a short call with the referee (the form included is then used as a guide during the call).

**Option 1 - Reference Request Template (Email)**

**Option 1**

**Subject: Reference Request for [Candidate’s Full Name]**  
  
Dear [Referee’s Name],  
  
I am writing on behalf of [Company Name] regarding [Candidate’s Full Name], who has applied for a [Job Title] position with us and listed you as a reference.  
  
We would be grateful if you could provide us with some feedback on [Candidate’s First Name]’s skills, experience, and suitability for this role. Any information you can share will be treated as strictly confidential and used solely for recruitment purposes.  
  
Specifically, it would be helpful to know:

* Your relationship to [Candidate’s First Name] and how long you worked together
* The candidate’s key strengths and areas for development
* Examples of their performance, reliability, and teamwork
* Any other comments that might help us in our decision-making

If possible, please reply by [insert date]. Should you prefer a quick call instead, we would be happy to arrange a convenient time.  
  
Thank you for your time and support.  
  
Best regards,  
[Your Full Name]  
[Your Job Title / Company]  
[Your Contact Information]

**Option 2:**

**Subject: Request for Reference Call re: [Candidate’s Full Name]**

Dear [Referee’s Name],

I hope you are doing well. I am reaching out on behalf of [ Company Name] regarding [Candidate’s Full Name], who has applied for a [Job Title] position with us and has listed you as a reference.

If you are available, we would appreciate arranging a short call at your convenience to discuss [Candidate’s First Name]’s experience and suitability for this role. We normally cover:

* Your relationship to the candidate and the length of time you worked together
* Key strengths and any areas for development
* Examples of their performance, reliability, and teamwork
* Any other comments that might be useful in our decision-making

We anticipate the call will take no more than 15–20 minutes. Please let me know your availability, and I will be happy to accommodate.

Thank you very much for your time and support.

Best regards,  
 [Your Full Name]  
 [Your Job Title / Company]  
 [Your Contact Information]

**Candidate Reference Form (Confidential)**

**Candidate & Referee Information**

| **Candidate Name** |  |
| --- | --- |
| **Role Applied For** |  |
| **Employment Dates (Start – End)** |  |
| **Reason for Leaving** |  |
| **Referee Name** |  |
| **Job Title** |  |
| **Company** |  |
| **Telephone Number** |  |
| **Email Address** |  |
| **Relationship to Candidate (Manager/Colleague/Direct Report/Client)** |  |

## Views on Candidate

| **General view on working with the candidate, their nature, work and achievements:** |  |
| --- | --- |
| **Areas of Weakness** |  |
| **How well did the candidate manage deadlines and pressure?** |  |
| **How did the candidate respond to feedback and guidance?** |  |
| **Did the candidate show leadership, mentoring, or initiative?** |  |
| **Was applicant honest and trustworthy at all times?** | ☐ Yes ☐ No (If no, please supply details) |
| **During employment was the candidate subject of a disciplinary procedure?** | ☐ Yes ☐ No (If yes, please supply details and outcome) |
| **Would you re-employ the candidate?** | ☐ Yes ☐ No (If no, please state reasons why) |
| **Do you have any other information you feel would be relevant to an employer?** |  |

## Soft Skills & Behavioural Fit

| **How would you describe their communication style?** |  |
| --- | --- |
| **How did they build relationships with team members and clients?** |  |
| **What type of work environment do you think they thrive in?** |  |

## Reliability & Integrity

| **How reliable was their attendance and timekeeping?** |  |
| --- | --- |
| **Were they trusted with sensitive information or responsibilities?** |  |

## Competency Ratings

| **Category** | **Excellent** | **Good** | **Satisfactory** | **Below Average** | **Poor** |
| --- | --- | --- | --- | --- | --- |
| **General Conduct** | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Work Performance** | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Attitude to Work** | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Initiative** | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Time Keeping** | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Adaptability to Change** | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Relationships with Colleagues** | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Relationships with Customers** | ☐ | ☐ | ☐ | ☐ | ☐ |

If you indicated applicant is “Below Average” or “Poor” for any category please state your reasons below:

## Additional Insights

| **What was the candidate’s strongest contribution to your team?** |  |
| --- | --- |
| **In what type of role would you see them excelling in the future?** |  |

## Final Recommendation

| **Highly Recommend** | ☐ |
| --- | --- |
| **Recommend** | ☐ |
| **Recommend with Reservations** | ☐ |
| **Would Not Recommend** | ☐ |