

Ardent

Search Company

Consultants for Leadership Selection

The Fine Art of Checking References

By Bob Dingman

A major flaw in the selection process with most Christian groups is that they are often too easily satisfied. What the search committee sees on paper and even feels from an interview with the candidate are valuable parts of the process, but they are not enough. For many committees the die is cast when the candidate gives the correct answers to the theology questions, has a good personality and a record of competence in previous positions.

If a warm glow develops toward the candidate in some of the committee members who are persuasive, the momentum starts to build. Then someone is likely to say in a stately fashion, "I believe this is God's man for us." That can settle the choice. But it often leads to serious trouble!

I suggest that the scenario just described is sloppy work and not what a good search committee will do. To cloak a half-done task in spiritual garb is an old trick among Christians, though usually it's done unknowingly. But it does not serve well.

Here's what I mean:

The leader of a prominent youth ministry organization once said to me, "We selected a very promising person to head up a ministry but he didn't work out. I guess God didn't want him to be here."

Without showing the degree of respect I really feel for this man, I blurted out: "Please don't blame the Lord for what you could have avoided with a few simple reference checks."

Search committees need to remember that Christian leaders who are candidates for a position—whether for a pastor, a para-church organization executive or a college president—are trained, able communicators. They are usually well-tailored, demonstrate good social skills, have personalities that are at least initially quite engaging and naturally, theology is "their thing."

This tendency toward ignoring or denying the obvious, results in a superficiality that makes it difficult for Christians to ask penetrating questions of Christian leaders.

Usually, it is "no contest" when the average committee and candidate meet. The person you seek to know may be as charming as you initially believe him to be, but you need to prove it. If that committee member is correct that "this is God's man for us," a thorough check of references will confirm that and convince the whole committee. However, if that committee member is only hallowing a personal feeling, careful reference checking may save the committee from presenting a future disaster to the group they serve.

He Looks Great, But How Can We Be Sure?

The art of reference checking seems to hold little interest in Christian circles but is seen as mandatory in making executive selections in the business world. The Alban Institute's otherwise fine booklet, **So You're on the Search Committee**, by Bunty Ketcham (24 pages) ignores reference checking as one of the five key tasks of the search committee. The Presbyterian Church (U.S.A.) has a helpful mimeographed piece **On Calling a Pastor**, (also 24 pages). But it devotes only half a page to checking references.

The Christian landscape is littered with debris, both personal and organizational, due to the poor choosing of leaders. Many of the mistakes were not due to anything new that developed in the life of the person after he was selected; they were just unknown to the search committee. Similarly, the prospective leader often fails to dig deeply enough in getting references on the church or college considering him. Inevitably then, all parties concerned are unhappily surprised later on. Why these lethal surprises? Four reasons seem to explain it.

1. Christians are particularly prone to believing the best about people, particularly of spiritual leaders.
2. Both the organization doing the search and the candidates put their best foot forward and tend to conceal their flaws and limitations.
3. Good reference checking takes time, courage and skill.
4. Search committee members often have too much confidence in their ability to "read people" or to get divine messages about the candidates.

Perhaps you find these four points insulting and want to refute them. Please read on before you decide.

Point One: The gullibility of Christians

Christians are a redeemed people; not perfect, it's true, but redeemed. We understandably emphasize the finer, spiritual aspects of our lives and try to ignore evidences of the old nature. We largely expect other Christians not to inquire about any part of our lives that is not Christ-honoring, and we extend to them the same courtesy. But this tendency toward an operative style of ignoring or denying results in a superficiality that makes it difficult for Christians to ask penetrating questions of Christian leaders.

I suspect another influence increases the reluctance to conduct meaningful reference checks. Matthew 7: 1 says to Christians, "Judge not, that ye be not judged," and many believers apply this Scripture mistakenly. This verse actually refers to our having an unforgiving, harsh spirit in judging another person, not to our evaluating that person's suitability for holding a particular post. Thus, checking references is not prohibited by God's Word; rather, such an exercise is an obligation of those church authorities who are responsible for choosing new leaders.

Point Two: The parties won't tell everything

I am not suggesting that the organization or the candidate deliberately mislead each other, though that does happen. However, either party might possibly have something that is a weakness and not want to mention it in the search setting. Power politics in the organization or a candidate with a problem spouse -- the "hidden" things on both sides can be numerous. Reading resumes and an initial interview typically do not let candidates and the committee get familiar enough to relax and become mutually vulnerable. Yet that very vulnerability is the beginning of the trusting relationship essential for success.

Point Three: Time, skill and courage are needed

Concerning the time required, checking references on a candidate may mean contacting four to six people to act as references. Finding those persons available for your phone call may require several calls, so a total of a dozen calls may be necessary and each contact could take up to a half hour.

The skill needed is in the delicate art of questioning (to be discussed in detail later), but obviously discretion and diplomacy are essential.

The courage requirement involves being able to ask probing questions about someone else's life. This is a rare and special kind of courage; not everyone can handle this assignment with the required grace.

Point Four: "Messages from the Lord" are not always confirmed

When a fellow Christian claims a leading from God about something in his life, we tend to respect that assertion as adequate for his guidance. However, when someone claims divine guidance for the whole search committee, you need to seek additional confirmation to be sure of the source of the message.

I suspect strong personalities are more often involved in these claims than are authentic messages from on high. I say this because time after time, I have seen key leadership decisions go bad when committee members caved in to a single member's "leading from the Lord." I genuinely believe that if God chooses to intervene in the search committee's activities, He also knows that a vote will be taken and will be gracious enough to give the message to a majority of the members.

Hard work and logical decisions under girded by prayer seem to me to be the way God lets us struggle with our leadership decisions in this day and age. For those persuaded otherwise, I can only urge you to take steps ensuring thorough confirmation that the source of the message is as claimed.

Look for the Flaws

During the face-to-face interview with a candidate, discerning strengths because they are more or less visible is easier than perceiving weaknesses or flaws because they are more or less invisible. Even if or when you spot a flaw, a group interview is an awkward setting in which to ascertain if the perceived weakness does exist and to what degree.

Busy Christian leaders have a tough enough job without the distractions of a clumsy search committee tromping into their world. Any leader will tell you that he finds being sought after a nice compliment, but such an emotional high is more than offset by the letdown of a subsequent rejection.

For example, if a college presidency candidate seems to regard fundraising negatively, or if a pastoral candidate gives visitation duties short shrift, these areas need to be discussed with the references. If these areas of disinterest or inability are genuine, they should be noted and factored into the overall pattern of strengths and weaknesses.

"Perfect" candidates seldom exist, so you want to identify the weaknesses in advance. Then you can plan to compensate for them. If you know of the limitation before the actual hiring, you will not experience the inevitable disappointment that results when it is discovered later.

Admittedly, no candidate embodies all that a search committee wants, but neither is any organization ever all the candidate expects. Trade-offs in the candidate's strengths and weaknesses to meet the needs of the organization or church are essential, and good reference checking gives a search committee the ability to do this.

Here is a useful rule of thumb concerning flaws: If you haven't found some flaws, keep on looking!

How to Handle Sensitive References

A friend who is a sophisticated businessman served on the pastoral selection committee of his church. They carefully checked the references of their leading candidate with sources in the church he was leaving and received very positive answers to their questions. He was called as pastor and they were later dismayed at finding a very different person than had been described to them. After he was terminated they questioned the references they had contacted as to why they had not been more forthright. "We didn't want to keep him from finding another job," came the distressing response.

I do not know if in this incident the questions were poorly posed or the respondents lied. Whichever way it happened, the intent to deceive worked, much to the distress of the second congregation. The ethics of the situation obviously forbids lying when a question is asked, although it can and

does happen. Yet no one has the responsibility to do more than respond to the question. If a candidate has problems with balky children, a significant health problem or casts a roving eye, telling you those things is not the reference giver's responsibility to tell unless asked. Knowing that fact in advance clearly requires that you have a list of questions to pose.

Let's suppose you ask a reference how well the candidate handles his staff and relates to them, and the respondent's written response is "Fairly Well." That can be a difficult term to interpret as it lies there on the page, but on the telephone the tone of voice says a lot more. Varying with the inflection, it can mean that a factor is a weakness or that it is a minor strength.

Do Reference Checking in Person or by Telephone!

Professionals in executive search consulting almost never use written references because of their negligible value. Often such references are requested by and then given to the individual involved which assures that they are not confidential and nothing negative can even be mentioned. A carefully crafted written reference may emphasize a few good things but choose to leave out significant negatives.

Remember, there is no eleventh commandment to tell everything, only the one that says we're not to lie. The Republican political party has its own eleventh commandment, "Never speak ill of fellow Republicans," and because of our training and culture we Christians tend in that direction too.

When a reference is given verbally, you can hear the hesitations, the enthusiasm or lack of it or detect guardedness. That should prompt you to follow up with other questions in that same interest area. If your follow-on questions finally cause the reference to decline further answers, you can be sure you are into an area that needs more examination with other sources. Keep on checking until you are satisfied that you have as good a grasp as your evaluation requires.

Accurate Answers

The task of getting accurate answers to well-thought-out questions may sound to you as if it can become a battle of wits. Indeed, it often is. Tension develops when the source has negative information that he or she does not wish to share, yet you need to have it. Happy, affirming data flows easily but, if you get into the touchy areas, that easy flow slows as resistance develops. Your tactics at this point require some mental toughness as you do several things to obtain what you need.

First, open the reference check with the assurance of absolute confidentiality within the search committee. You may choose to say that the reference will be shared "without attribution." That is, that the reference's name will not be disclosed, even to the search committee, but only identified as "a board member," "a deacon," "a faculty member," and so on. This assurance can help to loosen up a reluctant source. *And be sure you honor your word when you promise confidentiality!*

Second, you can remind the source that he is only one of a number of people you are checking with. In effect, you are saying that nothing he or she says will by itself cause the candidate to be dropped. You ease the contact's sense of guilt in this manner.

Third, you can still activate a sense of prospective guilt in references by posing your questions in such a way that they would need to lie, if they did not respond honestly to your questions. While they may not want to damage the candidate's standing, they normally will choose to do that rather than lie to you. Awareness of this approach can be a useful insight.

Fourth, if significant negative information develops, get off that particular point as soon as you can and avoid judgmental reactions. Also, be sure to conclude the reference check on an upbeat note.

How to Ask the Questions

As you pose the questions, remember that the first word you use shapes the response. Certain words yield only a yes or no answer. Here are a few examples:

Were you--?

Did he--?

Can he--?

Should he--?

If he--?

Other question starters naturally yield a narrative response that can yield more information, such as:

Why did he--?

How would--?

When--?

If you have an overly chatty source on your hands, use the first group of opening words to control the quantity. The second group can help open up a recalcitrant informant.

Be sure to ask for comparisons from your source. For example:

"How would you rate Dr. Johnson among the various college presidents you have worked with?"

"Would you please identify for me Pastor Gould's most significant strengths and weaknesses?"

Be careful to get amplification on the answer you get on that question about Pastor Gould's strengths and weaknesses. For instance, are his strengths strong enough to make him successful? Similarly, are his weaknesses possibly so minor that they are negligible and can be ignored?

I frequently use this question with a candidate's former boss: "If you had the opportunity to whisper in the ear of the candidate's new boss, what counsel would you offer that would best bring out his potential and control his limitations?"

Of course, your pencil should be flying as the answers are given, whether in person or over the phone.

Do *not* trust your memory.

Remember, recording a phone conversation may be illegal, unless the other party is aware of it. But I believe the request to record diminishes the openness of the responses given and the use of a speaker phone, so a group can hear the responses, also has a very inhibitory effect on the respondent.

Asking the Unthinkable Questions

As Christians, we know that all sin is abhorrent to God and in His eyes sin is not large or small, but in need of forgiveness. Despite that theological precept, we act on a day-to-day basis as if there were small ones that we should overlook, but big ones we must wrestle with as we unmask them in a candidate's life.

If you found out through references or from the candidate that he formerly had a drinking problem or had been addicted to prescription drugs several years ago, would you consider him further? What if he had been divorced? The list varies from group to group as to what matters would prohibit continued consideration of a candidate. You must decide that for your group.

From the time of King David to this week, some man of God in a leadership role is falling from that role because of a sin revealed to the followers. Human nature being what it is, I know of no way to reliably foretell whom this debacle may hit. However, as a search committee, your duty is to see if there is evidence of any misdeeds in the past that might carry an onus over to your organization.

I am familiar with Christian leaders who have been asked to leave several successive organizations or churches because no reference checks with their prior institutions raised questions in the area of the besetting sin. As Christians, we are not unfamiliar with the sin problem and we should never assume that our leaders are immune to it. The evidence clearly points to temptations being greater for leaders. That should suggest that a search committee be tough-minded enough to do what it can to ask questions concerning ethics, personal life and other related concerns.

Shortly after a prominent Christian leader was removed from his role, I experimented with a new question to a candidate. I hoped it might avoid a leadership catastrophe, such as had just happened, if this candidate had a real problem. During our interview I said I was beginning with him to bring up a new issue to all candidates for Christian leadership positions. I said to him:

Friend, if you have anything in your background that has the potential to blow up you and this ministry if it were revealed, I'm sure you don't want to discuss it with me. If by chance this is your situation, I implore you to use any reason you find convenient to withdraw from further consideration.

The next morning, I went to the hotel to take him to a meeting with the search committee. Instead, I found only a note of explanation left for me, saying that he needed to discipline a part of his life before he could take on a significant leadership role. I am still thankful to that man.

References to Beware of

Those of us who make a living involving reference checking come to recognize certain types of references that should be tested before being used:

The Hater: They can't find a good thing to say about the candidate. Everything is negative and you wonder what motivates this person. As you check with other references, see if you can find out what was wrong between the candidate and "the hater." Of course, if all the references hate the candidate, don't bother. Just drop the candidate.

The Faint Praiser: Faint praise isn't really support at all but token approval and perhaps this reference should be ignored. Once again, though, if all the references offer only faint praise, eliminate the candidate.

The Cheerleader: This person thinks the candidate did everything superbly and seems unable to offer helpful insights beyond effusive support. It makes you wonder if the source is the candidate's best friend, mentor, relative or owes him money. Keep on checking until you find better references.

What References Should You Seek?

Be sure that a candidate will not knowingly give you the name of a reference that will zing him. Most leaders who have made any difference have created enemies or adversaries, whatever the label that is given to their detractors. As I look for outstanding people, I expect to find some detractors and would wonder if some were not present. Try to encourage your candidate to accept this premise and get him to let you talk to a couple of them, as well as his boosters whose names he first provided.

The candidate's relationship with those in authority is an essential reference, so you certainly will want to talk with those to whom your candidate was previously accountable. If your candidate was terminated from that position, you will have some tricky ground to cover, and you may have to determine whether contacts need to be made with various political factions in his former place of employment so as to obtain those needed references from the candidate's superiors.

Peer references can be valuable too. If your candidate is a pastor, how is he regarded by other pastors; or if a president, by other presidents?

Subordinate references are essential if your candidate is to manage other people. If you are looking at a prospective college president, an insight into faculty opinions is needed. When your need is for a para-church executive, you may wish to ask a financial officer who served under your candidate about his financial knowledge and people-handling skills.

If your organization has denominational ties, you will probably want to get the view of denominational officials of your candidate. Remember though, your denomination may have an agenda different from yours that colors their view.

Confidentiality Revisited

At numerous places throughout this article, I mention the need for confidentiality to embrace the total search process. Reference checking offers particularly severe hazards to the confidentiality goal. As important as reference checking is, I urge you to place an even higher value on doing the checking in a manner that avoids disruption of any present ministry your candidate may have. Unless your candidate is unemployed or has an agreement with his board to leave, you face a compelling need to avoid doing anything to upset the people he now leads.

Also, I suggest that your search committee not even contact a prospective candidate until you have done a fair amount of preparatory background checking and referencing. It is callous and un-Christian to generate a candidate's high level of interest in your group and then quickly eliminate him when you learn something about him that you could have picked up earlier.

What Has He Written or Said?

Many pastors or leaders of Christian para-church groups have put into writing, on cassette or videotape, their best thoughts. Why not have a search committee member check to see if the candidate has written or preached "on the record." Many churches tape every message. Has your candidate ever written for your denominational periodical, his seminary, college or Bible school publication or for Christian publications such as Christianity Today, Eternity, Moody Monthly? A quick check may reveal he even authored a book.

If you get lucky in this line of inquiry, you can learn quite a bit about your candidate's theology, preaching style and special interests before you ever initiate a contact. And you can save travel, time and the possible embarrassment turning him down later on.

The Physical Check-up

If a candidate has a medical history or physical condition that may limit his performance or shorten his life expectancy, the hiring organization needs to be aware of that consideration. I know of instances where diabetes, a history of migraine headaches and even cancer has been known in advance, been disregarded and a successful relationship ensued. I am equally confident that examples of the reverse exist too. However, as long as the condition is revealed before the hiring, the fairness test has been met.

Be sure also to learn as much as you can from the candidate about the health of his dependents. Serious family medical problems may have financial and/or psychological impact on the person you are hiring.

I remind you that this is an area which may have legal restrictions, and you need to be aware of them. Be careful that you are cognizant of all applicable restrictions by consulting a competent authority.

Psychological Evaluation

In my experience, it is a rarity to request a candidate to undergo a psychological assessment. Unless there is a history of emotional instability in the candidate's past, I see no reason for this procedure.

Background Check

Not all godly people manage their finances well. Some may even not honor their obligations. If your candidate is precariously in debt or viewed as a poor credit risk, you should know about it in advance. If you decide to hire such a person, doing so will require some planning and precautions. Checking credit, driving records, criminal records and education are easily available at minimal cost and I encourage the use of this simple verification. Asking for a background check is not an unreasonable request of a candidate. Only in rare circumstances will a candidate object to such a request, and if one did object, I would suspect a problem.

Now that you and your committee have completed your research, reference checks, evaluations and background checks, if you are not yet prostrate with exhaustion, you are ready to consider your new leader's compensation package.

Compensation is thoroughly discussed in the book, [In Search of a Leader](#) and may be ordered by calling The Dingman Company 805 778-1777.

© Ardent Search Company 2007