

Consultant Reference Checking Guide

In an effort to simplify the Arizona Together for Impact funding process for the nonprofit organization, this Consultant Reference Checking Guide (CRCG) can be utilized in conjunction with the nonprofit's background/reference processes and should be modified as required. For optimal results, it is recommended to express confidentiality with the process and information to all parties. Encourage the consultant, to provide advance notification of the reference checks to their listed references.

SECTION 1: CONSULTANT INFORMATION	
CONSULTANT NAME	
COMPANY NAME	

SECTION 2: REFERENCE INFORMATION (SEE CIG SECTION 6: CONSULTANT REFERENCES. COMPLETE SEPARATE SHEET FOR EACH REFERENCE.)	
ORGANIZATION NAME	
CONTACT NAME	
CONTACT TITLE	
CONTACT NUMBER	
CONTACT EMAIL	

SECTION 3: REFERENCE CALL INTRODUCTORY COMMENTS SAMPLE SCRIPT
<p>Hello (name of reference), thank you very much for returning/accepting my call. As (name of consultant) indicated, we are considering engaging him/her for an important consulting project and would very much appreciate your comments and feedback on his/her recent consulting project with you. Your time is very much appreciated, and your feedback will be held in strict confidence.</p>

SECTION 4: REFERENCE CHECKING QUESTIONS		
	QUESTION	RESPONSE
1.	Please describe the nature of your recent project and the consultant's role in it?	
2.	What would you consider as the consultant's strengths?	
3.	What areas would you suggest we be cautious?	

4.	Would you hire the services of this consultant again?		
5.	For our project, we need someone who can provide the expertise in the area(s) of (see CIG Section 3: Consultant Desired Areas of Expertise). How would you rate the consultant on a scale of 1(not successful) to 10 (superbly successful) or NA (not applicable) for your project in each of these areas? Please briefly describe the work and/or deliverables generated in each area.		RATING
6.	Expertise 1:		
7.	Expertise 2:		
8.	Expertise 3:		
9.	Expertise 4:		
10.	Expertise 5:		
11.	Is there anyone else you recommend I speak to?		
12.	Is there anything else you would like to add or believe I should consider?		
	RATING TOTAL		

SECTION 5: REFERENCE SUMMARY AND COMPARISON

Once all reference checking calls are complete, combine the reference rating scores for each consultant. Remember qualitative information can be as important as the quantitative rating data. Also, take into consideration "NA" responses and number of references if different across consultant candidates. In general, the higher the rating the better. For example, if a consultant provided three references and you identified three critical expertise areas, then a score of 90 (3 references x 3 areas of expertise x 10 possible points for each = 90) is perfect score.