What should your team consider when you try to contact your charity to set up an interview? What can your team do to be successful in setting up an interview? Put yourself in the shoes of a charity representative who would answer the phone. Consider what tone and messages would make it more likely for a charity to respond to your request.

1. Who?

Determine the best person to speak with, and find their name and extension whenever possible. Some sample job titles include: Fundraising/Development Coordinator, Communications Coordinator, Program Coordinator, Program Manager, and Executive Director.

Our contact person: Job title:

Email: Phone number:

2. Why?

Explain clearly who you are, which school you attend. Explain the Youth and Philanthropy Initiative to them, and why your team has chosen their charity to represent.

Our team chose this charity because:

|  |
| --- |
|  |

3. When?

As a team, arrange three dates/times when you are all available to visit your chosen charity and have these at hand when you make the call so that you can give the charity some options.

Don’t procrastinate! Call your charity as soon as possible. It can take time to organize a convenient time to visit your charity. Don’t expect them to be available for a visit the day after you call.

Three dates and times our team is available are:

|  |
| --- |
| 1. |
| 2. |
| 3. |

4. How?

* Prepare and practice a script for your telephone conversation.
* Be clear and organized
* Be polite, professional and enthusiastic
* Show your interest and knowledge of the charity’s work in the community
* Be genuine in appreciating the opportunity to learn so much first-hand from charity staff; it’s a unique experience not every student gets to have.
* Show respect for the charity employee’s limited time; thank them for speaking with you even if they say that they are unable to participate in your project.   
  Don’t be discouraged if your top-choice is unavailable or does not return your phone calls/emails: contact another great charity from your shortlist.
* Decide with your team on the phone number and email address you will use to communicate with the charity.
* IF LEAVING A VOICEMAIL MESSAGE: If you cannot reach the staff member, leave a clear and effective message. See [Resource: Communicating with Charities](#Communicating_With_Charities).
* SENDING AN INTRODUCTION EMAIL: See [Resource: Communicating with Charities](#Communicating_With_Charities) for an email template that will help you to introduce YPI to your charity after speaking with them or leaving a voicemail.   
  Do not email your interview questions to the charity. They’re very busy working hard to help the community and it is unfair to ask them to do your work for you.
* Ask if the charity needs any help, offering to do something that adds value to why they would like meeting with you: Do they need volunteers? Are they on social media, or could you help increase their social media presence? Are there events this year that need help? Do they need clothing/food donations? Can you help speak up for the charity and its social issue, to others who can influence change?

Our team’s script for phone calls:

|  |
| --- |
|  |

Confirmed site visit date/time:

Name of person we will meet:

Address of charity:

How team members will travel to charity:

This resource provides helpful practice scripts, tips and templates to help you with the following:

* Telephone Call Scenarios
* How to Leave an Effective Voicemail
* Sending a Follow Up/Introduction Email
* Sending a Thank You Note

Telephone Call Scenarios

Example Phone Calls: Which one is more effective?

Scenario 1

Charity Representative: Hello Example Charity, James speaking.

Student: “Hello my name is (your name) and I’m calling from (name of school). Do you have a moment to speak?”

Charity Representative: “Yes, certainly. How can I help you?”

Student: “Thank you. My school is currently taking part in a program called the Youth and Philanthropy Initiative (YPI). We have been examining the social issues affecting our community and the local charities working in the area. Each team has chosen one charity to research and support and my team wondered whether it might be possible for us to visit your charity to ask you some questions about your work. We will use the information to create a presentation which we will deliver in a competition with our classmates. The team that gives the best presentation in the school will be awarded a grant to donate to the charity we have researched.”

Charity Representative: “That sounds like an interesting project – could you email me some more details?”

Student: Of course, I have an information sheet. What is your email address please?”

Charity Representative: “It is examplecharity@phonecallexample.org”

Student: “Great – I will email some more information to you straight away.”

Charity Representative: “And so, your team has chosen to research the Example Charity?”

Student: “Yes, that’s right. We really wanted to support a charity that works with young people in the area.”

Charity Representative: “Fantastic, thank you. When would you like to come and visit?”

Student: “Would September 14th at 4:15pm be possible? Our whole team is free then.”

Charity Representative: “Let me look at my calendar. No, sorry I am afraid I am busy on that day. Do you have any other dates?”

Student: “Yes, we have a couple dates that we are all free. Could we come on the 17th at 3:45pm?”

Charity Representative: “That is fine. How long will you need?”

Student: “Around 45 minutes would be great. If we were able to ask you some questions and have a look around we would really appreciate it.”

Charity Representative: “That will be fine. I look forward to meeting you on the 17th. Bye.”

Student: “Yes, you too and thank you very much.”

Scenario 2

Charity Representative: Hello Example Charity, James speaking.

Student: “Hi I’m calling about this charity thing.”

Charity Representative: “Sorry, I don’t understand. Where are you calling from?”

Student: “I’m calling from (name of school). We’re doing this project where we choose a charity to visit and you get a grant maybe.”

Charity Representative: “How can I help you?”

Student: “We want to come to your charity to, you know, talk.”

Charity Representative: “I am afraid I don’t really follow. Perhaps you could call back   
another time?”

Student: “Alright, bye.”

How to Leave an Effective Voicemail

Charities can be very busy places, and you may have to leave a message clearly stating the purpose of your call, and an appropriate way to be reached, so that they can return your call at a convenient time. These are important things to consider when leaving an appropriate message:

* Get a specific person’s name or position that you can ask for
* Use a formal greeting: “Good morning/afternoon”
* State your name and where you are calling from
* It’s a good idea to say the date and time
* The purpose of your call
* A phone number where you can be reached
* An appropriate time when they can return your call
* Thank you and formal close
* And remember, speak slowly and clearly!

Example Voicemails: Which one is more effective?

Scenario 1

“Good afternoon, my name is Pedro Mendez, I’m calling from Example Secondary School. It’s now 1:00 PM on Tuesday the 7th of February. I’m calling to speak with Mr. Chan / the Program Coordinator regarding a school project for the Youth and Philanthropy Initiative. If you could please call me back at Appropriate Number, I am available this afternoon between 2-4 pm as well as all day tomorrow. Thank you and have a great day!”

Scenario 2

“Hi George, I’m calling to find out more about your charity. Can you call me back later? Thanks, bye.”

Sending an Introduction Email

When you speak with your charity, it’s a good idea to ask for an email address so that you may send an introductory email about YPI and provide more details about why you would like to research and visit their organization. Here are some helpful sample introduction email templates for you to use after speaking with a charity representative or leaving a voicemail.

Sample Email #1

An introduction email, for when you’ve left a voicemail but have not been able to speak with someone.

Dear [Name of charity representative],

I am a student at (name of your school), and my class is working on a project called the Youth and Philanthropy Initiative (YPI). For more information about YPI, or to speak with a YPI staff member, please visit [www.goypi.org](http://goypi.org/)

During YPI, students work in teams to understand more about local social issues, and then choose one charity to research, visit and make a presentation about, for three main purposes: To advocate for the important social issues you address; to learn about your goals, challenges and hopes so we can show others the impact that you are having in the community and how they can support you; and to try to win a $5,000 grant for your charity in a friendly competition at my school.

Our team would like to research your charity because \_\_\_\_\_\_\_\_\_

We left a message for you earlier (today/this week), in the hopes that we can arrange to visit your location and interview you or another staff member about your charity.

May we ask if there are dates and times convenient for you in the next week or two? Here are a few dates and times that our whole team is available: \_\_\_\_\_\_\_\_

Please let us know what would work best for you. We respect your time, and are organising our questions thoughtfully before we meet.

Thank you again for your time and attention. We look forward to your reply.

Sincerely,

[Student names]

[School name]

[Grade level, Subject area, Class of (Teacher name)]

Sample Email #2

A follow-up message, for when your charity has agreed to an interview date.

Dear [Name of charity representative],

Thank you sincerely for your response and for kindly offering us a time when we will be able to meet you and visit [Charity Name], to gain a greater appreciation of your work, vision, impact and goals.

We are confirming here the details of our visit to [Charity Name]:

Date: \_\_\_\_\_\_\_\_

Time: \_\_\_\_\_\_\_\_

Names of students in our team: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

As we prepare to be efficient, effective and respectful during our visit, may we ask?

* May we bring a camera and/or video camera to [Charity Name] to take photos or video of our interview with you, or of the facilities?
* Would you or other members of your charity be willing to share any stories about your work, or people that you’ve worked with?

Whatever your response, we will respect your views and prepare accordingly.

Please let us know if anything changes regarding the details of our visit. Thank you very much again for your time. We believe the social issue of \_\_\_\_\_\_\_\_\_\_\_\_\_ is important to address, and we truly look forward to the opportunity to learn from your perspectives and experience.

Sincerely,

[Student names]

[School name]

[Grade level, Subject area, Class of (Teacher name)]

[YPI website]