

Investing Masterclass: Design Document

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## **Scope of Project**

The module will instruct learners on how to create a comprehensive investing plan using financial statements and portfolio analysis. The lesson will take about an hour to complete. The goal is to promote mathematical literacy and financial literacy through education about investments. The primary elements of this project will have the learner understand an introduction to investing, followed by being able to analyze the income statement, balance sheet, and statement of cash flows. Investment decisions will be based on the financial performance of the company, known as fundamental analysis. After the module is completed, the learner will have a final assessment that will gauge knowledge of the three sheets/statements, their purposes, ratios, and benchmarking of their performance.

## **Learner Analysis/Description**

The course is geared towards high school and college students with little investing experience. This product will promote financial literacy among Generation Z. The target ages would be from 14 to 25. Much like the Millennials, Generation Z lacks financial literacy and investment knowledge.

This course will be all-inclusive, which means that the course will be geared toward people of all backgrounds. It will foster diversity and be inclusive of users from any gender, race, identity, or disability.

## **Description of Learning Theory and Instructional Strategies**

Social cognitive theory's self-efficacy and self-regulation will promote mathematical and financial literacy through increased engagement. Self-efficacy is the belief that one has power over one's actions. Self-regulation is to be able to regulate and control one's thoughts, actions,

and feelings. Both aspects will be used in conjunction with digital game-based learning to promote engagement. Digital game-based learning is an instructional strategy that incorporates digital games for learning. Engagement will be increased through intrinsic and extrinsic motivators from things like points and badges. Students who are neurodivergent and have learning disabilities will be considered for this module. These groups will be addressed using the UDL principle of engagement.

### **Learning Objectives**

By the end of this course, the learner should be able to:

1. Interpret key financial concepts.
2. Assess portfolio risk and return.
3. Calculate financial ratios and analyze them across time.

### **Forms of Assessment**

1. (Reaction) What are the learner's feelings about the module? (This will not be used.)
2. (Learning) How has knowledge been increased? (Formative and summative assessments will be made.)
3. (Behavior) How has this knowledge been applied to learning? (This will be used)
4. (Results) The effect of the training on the organization, individual, or school. (This will not be used.)

Assessments will be made for learning through multiple choice and true/false. They will be both formative and summative. At the end of each module, there will be an assessment. These assessments will measure level 2. There will also be a final assessment at the end, which will try and apply the concepts to real-world scenarios. The user will analyze a

financial statement and decide whether to invest in the company's stock or not, which would be considered level 3.

### **Project Management Chart/Timeline**

<b>Deadlines</b>	<b>Items</b>
9/22/2024	Post topic
10/04/2024	Submit design document
10/20/2024	Submit alpha prototype
10/27/2024	Alpha peer feedback
11/4/2024	SME Evaluation
11/24/2024	Submit beta prototype
12/6/2024	Submit a video of the product
1/21/2025	Post gold version

### **Usability Testing Procedures/Alpha and Beta Evaluation Procedures**

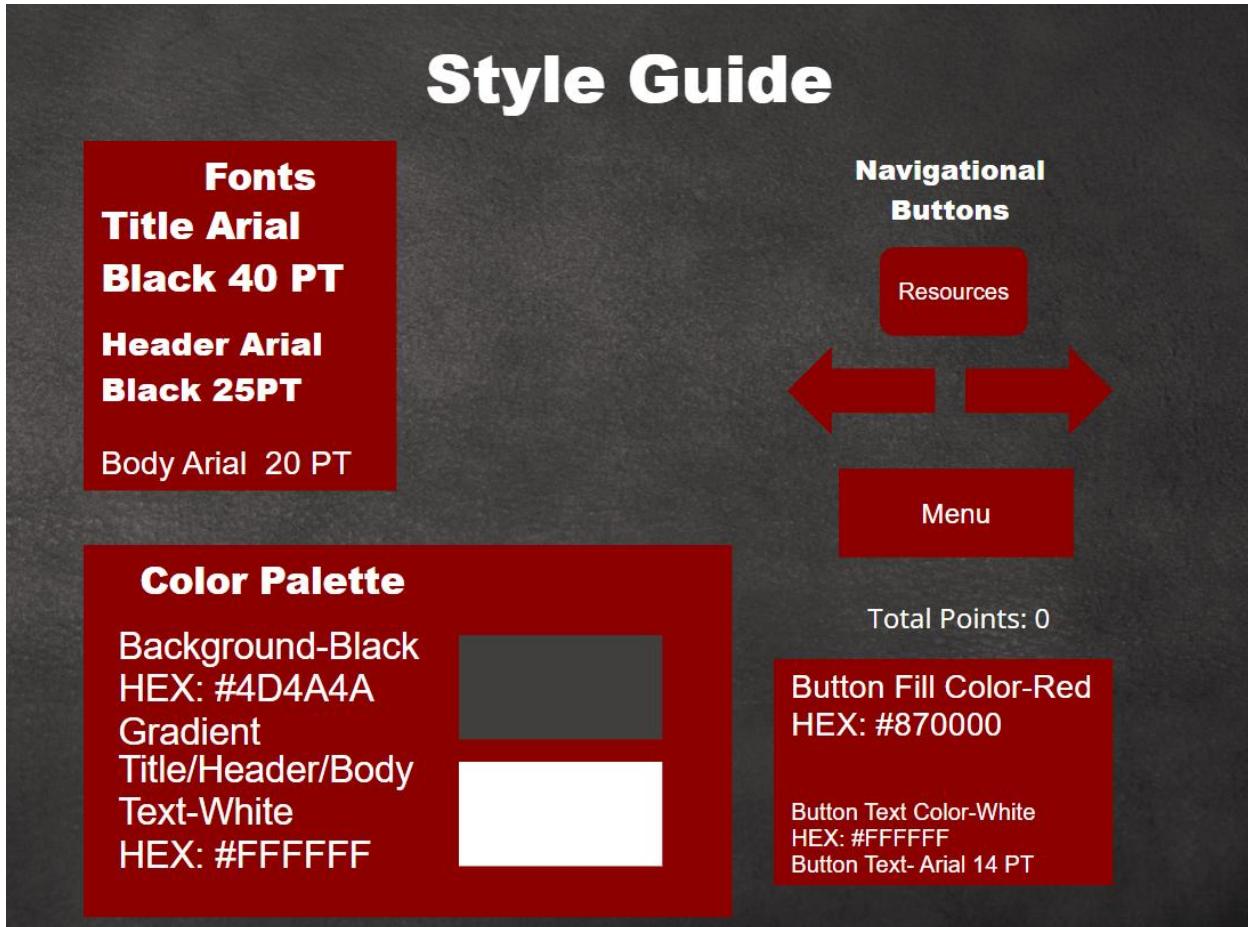
The purpose of usability testing is to test the product's effectiveness, accuracy, efficiency, and functionality. Effectiveness will be measured by how well the content meets its objectives. Accuracy will pertain to the information being up-to-date, error-free, and correct. Efficiency will be measured by how well the course is completed in a timely manner. Lastly, functionality will evaluate the user interface.

The table below provides a guideline for evaluating the instructional product:

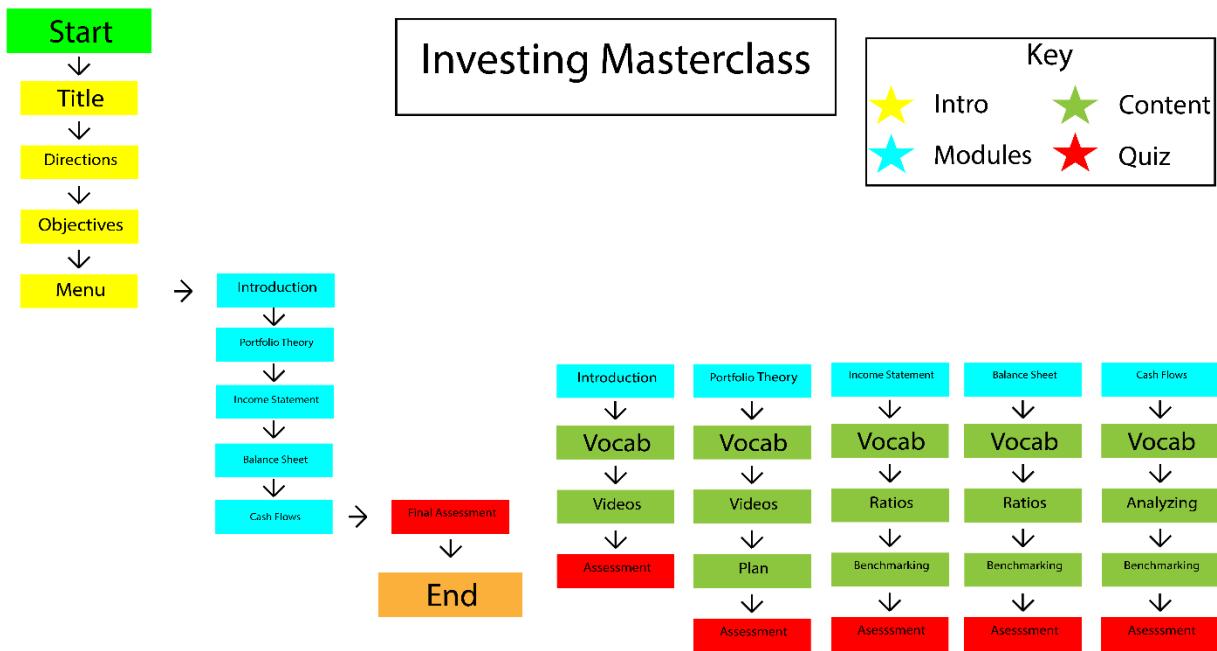
Criteria	Responses				
<b>Effectiveness</b>					
<i>Did the course help you achieve the learning objectives?</i>	<i>Not At All</i>	<i>Slightly</i>	<i>Moderately</i>	<i>Extremely</i>	
<i>How confident do you feel in your understanding of the subject matter after completing the course?</i>	<i>Not at all Confident</i>	<i>Somewhat Confident</i>	<i>Moderately</i>	<i>Very Confident</i>	
<i>Did the course effectively convey concepts or processes? If not, explain why.</i>					
<b>Accuracy</b>					
<i>Do you have any prior knowledge of investing? If so, how accurate did you find the information presented in the course?</i>	<i>Very Inaccurate</i>	<i>Inaccurate</i>	<i>Neutral or N/A</i>	<i>Accurate</i>	
<i>Were there any instances of misinformation or spelling/grammatical errors in the course? If so, please specify.</i>					
<b>Efficiency</b>					
<i>Did you find the course time-efficient in delivering the necessary information?</i>	<i>YES</i>		<i>NO</i>		
<i>Were there any unnecessary or redundant sections?</i>	<i>YES</i>		<i>NO</i>		

<i>How would you rate the overall pacing?</i>	<i>Too slow</i>	<i>Just Right</i>	<i>Too Fast</i>
<i>Please suggest any improvement to enhance the efficiency/pacing of the course.</i>			
<b>Functionality</b>			
<i>How user-friendly was the interface?</i>	<i>Too slow</i>	<i>Just Right</i>	<i>Too Fast</i>
<i>Did you encounter any technical issues, such as broken links or difficulty navigating?</i>	<b>YES</b>	<b>NO</b>	
<i>Please describe any technical issues and how they impacted your learning experience.</i>			

## Style Manual



## Flowchart



## Storyboards

Pg#	On-Screen Text
3 Main	<p><b>Learning Objectives</b></p> <ol style="list-style-type: none"> <li>1. Interpret key financial concepts.</li> <li>2. Assess portfolio risk and return.</li> <li>3. Calculate financial ratios and analyze them across time.</li> </ol>
Navigation	<a href="#">Previous Slide</a>  <a href="#">Next Slide</a>

Pg#	On-Screen Text	Navigation (Top)	Navigation (Directions)
4 Main	Please select a topic	<a href="#">Introduction</a> <a href="#">Portfolio Theory</a> <a href="#">Income Statement</a> <a href="#">Balance Sheet</a> <a href="#">Statement of Cash Flows</a> <a href="#">Final Assessment</a>	<a href="#">(Go to 5.1)</a> <a href="#">(Go to 6.1)</a> <a href="#">(Go to 7.1)</a> <a href="#">(Go to 8.1)</a> <a href="#">(Go to 9.1)</a> <a href="#">(Go to 10.1)</a>
Navigation (Bottom)	<a href="#">Previous Slide</a> 		

Pg#	On-Screen Text
5.1	<p><b>Stocks Basics</b></p> <ul style="list-style-type: none"><li>·A <b>corporation</b> is a legally defined, artificial being separate from its owners. As such, it has many legal powers that people have. It can enter contracts, acquire assets, and incur obligations. For instance, Microsoft is a corporation.</li><li>·<b>Stock</b> is the ownership or equity in a corporation.</li><li>·<b>Equity</b> is the collection of all the outstanding shares of a corporation.</li><li>·A <b>shareholder</b> is an owner of a share of stock or equity in a corporation.</li><li>·A <b>stock market</b> is an organized market on which the shares of many corporations are traded.</li><li>·The most prominent stock market is the New York Stock Exchange. For the most part, you will be making purchases from an exchange.</li></ul>

Navigation

External  
Link

Resources

Previous  
Slide

Next Slide

Menu

Main  
Menu