

HIGH-LEVEL DESIGN DOCUMENT

Portfolios with Purpose

A blended-learning investing curriculum for high school and college students — where simulated portfolios fund real charitable giving.

Portfolios with Purpose (PwP)

Instructional Designer: Andrew Chesnutt

Delivery: Custom LMS (Harvest) • Blended video, written lessons & activities

Portfolios with Purpose

Portfolios with Purpose is a nonprofit that teaches high school and college students how to invest in the stock market. Students build a simulated portfolio, and based on how it performs, real donations are distributed to a charity of the student's choosing. This curriculum was designed from client-provided expert videos and turned into a structured, blended-learning course: each lesson pairs a short video with written lessons and hands-on activities, building from investing fundamentals to analyzing stocks to constructing and managing a live portfolio on the PwP platform.

Course Details

Audience	High school & college students	Delivery	Custom LMS (Harvest)
Format	Blended: video + written + activity	Structure	3 modules, 15 core lessons
Source Material	Client-provided expert videos	Companion	Student guide created from course
Assessment	Per-module knowledge checks	My Role	Full course design & build

Design Approach

Design principles

- Built from source video: took client-provided expert interviews (Mark Yusko, Meredith Jenkins, and others) and designed a structured curriculum around them.
- Blended learning: every lesson combines a short video, one or more written lessons, and a hands-on activity — reinforcing each concept through multiple modes.
- Scaffolded progression: the course builds deliberately from “why invest” through stock analysis to constructing and managing a real portfolio.
- Learning by doing: activities culminate in students building an actual portfolio on the PwP platform, tying the lessons to a live, consequential outcome.
- Consistent lesson pattern: each lesson opens with core concepts and closes with a written wrap-up, giving students a predictable rhythm.
- Companion student guide: a printable guide was generated from the course material to support offline study.

Module Map

#	Module	Focus
1	Introduction and Objectives	Why invest, asset classes, building a portfolio
2	Analyzing Stocks	Investor mindset, market cycles, indicators
3	Put It All Together	Case studies, the PwP Portfolio Builder, launch

Fifteen core lessons across three modules, each blending video, written lessons, and activities, with a knowledge check per module.

MODULE 1 Introduction and Objectives · 5 lessons + knowledge check

Learning objectives

- Explain the value of investing and the power of compounding.
- Compare asset classes and describe how to select and combine stocks into a portfolio.
- Set up a personal profile on the PwP platform.

Lesson	Content
L1: Why Invest?	Video (Ulrike Burchardi-Hoffman) + goal-setting activity + written wrap-up
L2: Why Invest in Stocks?	Video (Meredith Jenkins) + written: Asset Classes, Appreciation in Stocks + activity + wrap-up
L3: How to Select Stocks	Video + written: Picking Companies + activity + wrap-up
L4: Combining Stocks into a Portfolio	Video + written: Portfolios vs Single Stocks, Diversification + activity + wrap-up
L5: How It Works — Building Your PwP Profile	Platform walkthrough video + written overview + “Test a Portfolio” activity
Module Knowledge Check	Assessment

MODULE 2 Analyzing Stocks · 5 lessons + knowledge check

Learning objectives

- Adopt an investor's mindset and identify where to source investment ideas.
- Read market cycles, indexes, and indicators.
- Explain diversification, the Sharpe Ratio, and the players behind every trade.

Lesson	Content
L1: See the World Like an Investor	Videos (Mark Yusko): sourcing ideas & daily habits + written wrap-up
L2: Where Are We Now? Market Cycles	Video + written: Market Indexes, Market Cycles + “Watch the Market” activity + wrap-up
L3: Resources for the Curious Investor	Video + written: Market Indicators + activity + wrap-up
L4: What Makes a Great Investor?	Video + written: The Sharpe Ratio, Covariance + activity + wrap-up
L5: How It Works — The Market Players	Video (Mark Yusko) + written: People That Make Up the Market
Module Knowledge Check	Assessment

MODULE 3 Put It All Together · 5 lessons

Learning objectives

- Apply the course concepts to real case studies.
- Build and launch a live portfolio using the PwP Portfolio Builder.
- Understand next steps, including careers in the field.

Lesson	Content
L1: Introduction	Video + written introduction
L2: Case Studies	Overview video (Brett) + four written case studies + wrap-up
L3: How It Works — Using the PwP Portfolio Builder	Platform overview video + written setup + “Set Up Your Portfolio” activity + wrap-up
L4: Let's Go	Recap video + “Create Your Portfolio” activity + written: Watch Your Portfolio
L5: Course Wrap Up	Wrap-up video (Brett) + written: Jobs in Stocks

