

Overview

Overview | Investment Research



Investment Research

by Kathy Thiebes

Personal finance skills and knowledge are important for students to learn during high school. There are three central Oregon State Standards addressed in the module: explain the function of the stock market; compare and contrast different options for long term investment; and identify and explain different opportunities for investment and draw economic conclusions from market data.

In this module, students will take on the role of a recently hired stockbroker and complete analysis of a publicly traded company of their choosing and evaluate the risks and rewards of the investment. The end product is a report that identifies the risks and rewards of investing in the company and advises the client as to whether it is a good investment or not. The module begins with guided reading, research, and analysis of the Walt Disney Company. By modeling and scaffolding the research of one company as a class, students will be more prepared to research their own selected company for the final product. Students will work in partners to complete the research and write the report on their chosen company.

This module is the first in a series of 3 scaffolded modules taught in the semester-long course. Students will keep all texts and their Research Notebook (see resources) in a portfolio to help them stay organized and support the teacher in providing efficient feedback.

Grades: 11 12

Discipline: Social Studies

Teaching Task: Task Template 5 (Argumentation and Evaluation)

Course: Economics

Author Information:

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Section 1: What Task?

TEACHING TASK

Task Template 5 — [1 Level]

Argumentation & Evaluation

L1: After researching articles and data on a publicly traded company , write a report for a client that discusses the risks and rewards of investing in the company and evaluates its potential value as an investment . Be sure to support your position with evidence from the texts.

STUDENT BACKGROUND

Imagine that an investment firm recently hired you. Your first assignment with the firm will be to evaluate a company as a potential investment for an important client. In your report to the client, you will need to provide them with important information about the company and your recommendation as to whether or not they should invest in the company. It is essential to give the client a full analysis of the company, including both the risks and possible rewards. You will be working with a colleague to ensure accuracy and depth of your research.

EXTENSION

Rubric

Scoring Elements	Not Yet		Approaches Expectations		Meets Expectations		Advanced
	1	1.5	2	2.5	3	3.5	4
Focus	Attempts to address prompt, but lacks focus or is off-task.		Addresses prompt appropriately and establishes a position, but focus is uneven.		Addresses prompt appropriately and maintains a clear, steady focus. Provides a generally convincing position.		Addresses all aspects of prompt appropriately with a consistently strong focus and convincing position.
Controlling Idea	Attempts to establish a claim, but lacks a clear purpose. (L2) Makes no mention of counter claims.		Establishes a claim. (L2) Makes note of counter claims.		Establishes a credible claim. (L2) Develops claim and counter claims fairly.		Establishes and maintains a substantive and credible claim or proposal. (L2) Develops claims and counter claims fairly and thoroughly.
Reading/Research	Attempts to reference reading materials to develop response, but lacks connections or relevance to the purpose of the prompt.		Presents information from reading materials relevant to the purpose of the prompt with minor lapses in accuracy or completeness.		Accurately presents details from reading materials relevant to the purpose of the prompt to develop argument or claim.		Accurately and effectively presents important details from reading materials to develop argument or claim.
Development	Attempts to provide details in response to the prompt, but lacks sufficient development or relevance to the purpose of the prompt. (L3) Makes no connections or a connection that is irrelevant to argument or claim.		Presents appropriate details to support and develop the focus, controlling idea, or claim, with minor lapses in the reasoning, examples, or explanations. (L3) Makes a connection with a weak or unclear relationship to argument or claim.		Presents appropriate and sufficient details to support and develop the focus, controlling idea, or claim. (L3) Makes a relevant connection to clarify argument or claim.		Presents thorough and detailed information to effectively support and develop the focus, controlling idea, or claim. (L3) Makes a clarifying connection(s) that illuminates argument and adds depth to reasoning.
Organization	Attempts to organize ideas, but lacks control of structure.		Uses an appropriate organizational structure for development of reasoning and logic, with minor lapses in structure and/or coherence.		Maintains an appropriate organizational structure to address specific requirements of the prompt. Structure reveals the reasoning and logic of the argument.		Maintains an organizational structure that intentionally and effectively enhances the presentation of information as required by the specific prompt. Structure enhances development of the reasoning and logic of the argument.
	Attempts to		Demonstrates an uneven command of		Demonstrates a command of standard English conventions and		Demonstrates and maintains a well-developed command of standard English conventions and

<p>Conventions</p>	<p>demonstrate standard English conventions, but lacks cohesion and control of grammar, usage, and mechanics. Sources are used without citation.</p>	<p>standard English conventions and cohesion. Uses language and tone with some inaccurate, inappropriate, or uneven features. Inconsistently cites sources.</p>	<p>cohesion, with few errors. Response includes language and tone appropriate to the audience, purpose, and specific requirements of the prompt. Cites sources using appropriate format with only minor errors.</p>	<p>cohesion, with few errors. Response includes language and tone consistently appropriate to the audience, purpose, and specific requirements of the prompt. Consistently cites sources using appropriate format.</p>
<p>Content Understanding</p>	<p>Attempts to include disciplinary content in argument, but understanding of content is weak; content is irrelevant, inappropriate, or inaccurate.</p>	<p>Briefly notes disciplinary content relevant to the prompt; shows basic or uneven understanding of content; minor errors in explanation.</p>	<p>Accurately presents disciplinary content relevant to the prompt with sufficient explanations that demonstrate understanding.</p>	<p>Integrates relevant and accurate disciplinary content with thorough explanations that demonstrate in-depth understanding.</p>

STANDARDS

Common Core Anchor Standards — Reading

R.CCR.1: Read closely to determine what the text says explicitly and to make logical inferences from it; cite specific textual evidence when writing or speaking to support conclusions drawn from the text.

R.CCR.2: Determine central ideas or themes of a text and analyze their development; summarize the key supporting details and ideas.

R.CCR.4: Interpret words and phrases as they are used in a text, including determining technical, connotative, and figurative meanings, and analyze how specific word choices shape meaning or tone.

R.CCR.7: Integrate and evaluate content presented in diverse media and formats, including visually and quantitatively, as well as in words.

R.CCR.8: Delineate and evaluate the argument and specific claims in a text, including the validity of the reasoning as well as the relevance and sufficiency of the evidence.

R.CCR.9: Analyze how two or more texts address similar themes or topics in order to build knowledge or to compare the approaches the authors take.

R.CCR.10: Read and comprehend complex literary and informational texts independently and proficiently.

Common Core Anchor Standards — Writing

W.CCR.1: Write arguments to support claims in an analysis of substantive topics or texts, using valid reasoning and relevant and sufficient evidence.

W.CCR.4: Produce clear and coherent writing in which the development, organization, and style are appropriate to task, purpose, and audience.

W.CCR.5: Develop and strengthen writing as needed by planning, revising, editing, rewriting, or trying a new approach.

W.CCR.6: Use technology, including the Internet, to produce and publish writing and to interact and collaborate with others.

W.CCR.7: Conduct short as well as more sustained research projects based on focused questions, demonstrating understanding of the subject under investigation.

W.CCR.8: Gather relevant information from multiple print and digital sources, assess the credibility and accuracy of each source, and integrate the information while avoiding plagiarism.

W.CCR.9: Draw evidence from literary or informational texts to support analysis, reflection, and research.

W.CCR.10: Write routinely over extended time frames (time for research, reflection, and revision) and shorter time frames (a single sitting or a day or two) for a range of tasks, purposes, and audiences.

Common Core Anchor Standards — Language

L.CCR.1: Demonstrate command of the conventions of standard English grammar and usage when writing or speaking.

L.CCR.2: Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing.

L.CCR.4: Determine or clarify the meaning of unknown and multiple-meaning words and phrases by using context clues, analyzing meaningful word parts, and consulting general and specialized reference materials, as appropriate.

Common Core Anchor Standards — Speaking and Listening

SL.CCR.1: Prepare for and participate effectively in a range of conversations and collaborations with diverse partners, building on others' ideas and expressing their own clearly and persuasively.

Custom Standards

OREGON SOCIAL STUDIES CONTENT STANDARDS: HS.40: Identify and explain different opportunities for investment and draw economic conclusions from market data. HS.42: Compare and contrast different options for long term investment (e.g., stocks, bond, CDs, mutual funds IRA, 401k, pension plans, Social Security). HS.54: Explain the function of the stock market.

Section 2: What Skills?

Selected Skills

Preparing for the Task

TASK ENGAGEMENT: *Ability to cite specific textual evidence to support analysis of secondary sources, connecting insights gained from specific details to an understanding of the text as a whole (RH 11-12.1). *Ability to participate effectively in collaborative discussions (SL 11-12.1).

TASK AND RUBRIC ANALYSIS: Ability to read purposefully and determine the central ideas of a secondary source and provide an accurate summary that makes clear the relationships among the key details and ideas (RH 11-12.2).

Reading Process

INTRODUCTION TO STOCK MARKET RESEARCH: Ability to navigate online stock market resources available for research and understand how to identify appropriate sources (RH 11-12.7). *Ability to gather relevant information from multiple authoritative print and digital sources, using advanced searches effectively; assess the strengths and limitations of each source in terms of the specific task, purpose, and audience; integrate (WH 11-12.8).

ACTIVE READING AND NOTE-TAKING: Ability to read and determine central ideas of the text and cite specific textual evidence to support analysis of the texts (RH 11-12.1,2) *Ability to integrate and evaluate multiple sources of information presented in diverse formats and media (e.g., visually, quantitatively, as well as in words) in order to address a question or solve a problem (RH 11-12.7). *Ability to evaluate an author's premises, claims, and evidence by corroborating or challenging them with other information (RH 11-12.8).

ORGANIZING NOTES: Ability to integrate information from diverse sources, both primary and secondary, into a coherent understanding of an idea or event, noting discrepancies among sources (RH 11-12.9). *Ability to ... assess the strengths and limitations of each source in terms of the specific task, purpose, and audience (WH 11-12.8).

Transition to Writing

BRIDGING CONVERSATION: *Ability to explain the rubric and begin linking reading, notes, and discussion to writing task (RH 11-12.1). *Ability to engage in meaningful discussion by posing and responding to guiding questions and responding thoughtfully to diverse perspectives. Synthesize comments, claims and evidence made on all sides of an issue (SL 11-12. 1c/d).

Writing Process

ESTABLISHING A CLAIM.: Ability to establish a formal claim in response to the task, including a

recommendation to the client (WH 11-12.1).

PLANNING: Ability to create a logical organization of main points and evidence in an outline format needed for a report (WH 11-12.1).

DEVELOPMENT: Ability to write arguments to support claims and address counterclaims in an analysis of the topic/texts using valid reasoning and relevant and sufficient evidence (WH 11-12.1). *Ability to produce a clear and coherent report in which the development, organization, and style are appropriate to task, purpose, and audience (WH 11-12.4) *Ability to write routinely over an extended time frame (WH 11-12.10).

REVISION AND EDITING: Ability to develop and strengthen writing as needed by planning, revising, editing, rewriting, or trying a new approach (WH 11-12.5).

COMPLETION: Ability to submit final piece that meets expectations.

Section 3: What Instruction?

MiniTasks

Preparing for the Task

TASK ENGAGEMENT: *Ability to cite specific textual evidence to support analysis of secondary sources, connecting insights gained from specific details to an understanding of the text as a whole (RH 11-12.1). *Ability to participate effectively in collaborative discussions (SL 11-12.1).

SHORT CONSTRUCTED RESPONSE

1 Class Period

Journal Prompt: What does it mean to “invest” in something? What do you think a stock is?”

Read "Wallstreet for Beginners" and complete guided notes.

What are your favorite brands/companies? What do you like about them? What are your least favorite brands/companies? Why do you dislike them?

Scoring Guide (Work Meets Expectations If):

Meets expectations if students respond to the journal question, participate in class discussion, and accurately complete "Wallstreet for Beginners" guided notes.

Instructional Strategies:

- Journal - Students will complete the opening journal entry and discussion in order to introduce the content and check for prior knowledge.
- Class Discussion – In pairs, students will share their responses to the journal. Students will share out as a class, teacher writes responses on the board and helps students narrow down to the correct definition of of a stock and investment.
- Students read "Wallstreet for Beginners" and complete guided notes. Give students time to compare notes with partners.
- Last 15 min. of class - Ask students to "make a list of your favorite brands/companies? What do you like about them? What are your least favorite brands/companies? Why do you dislike them?"
 - o Teacher uses internet/projector to show companies that are discussed by the class on “google finance” and elicits reactions from students about different companies and their stock prices. A great example is McDonald's and the impact of the documentary "Supersize Me".

Accommodations and Interventions:

Provide students with sentence starters and frameworks for their quick-writes. Example:

To invest in something means to _____. I think a stock is _____.

For advanced students, do not provide them with guided notes for the "Wallstreet for Beginners" article and instead have them take notes independently.

TASK AND RUBRIC ANALYSIS: Ability to read purposefully and determine the central ideas of a secondary source and provide an accurate summary that makes clear the relationships among the key details and ideas (RH 11-12.2).

SHORT CONSTRUCTED RESPONSE**1 class period**

Quick-Write: What is your initial reaction to the task? In your own words, write a brief explanation of what each portion of the task is asking you to do.

Essential Concepts/Vocabulary: Record cornell notes on investment vocabulary and concepts from a teacher-led lecture/powerpoint. Create a poster for your assigned vocabulary word that puts the definition in your own words and includes a picture that represents the definition.

Scoring Guide (Work Meets Expectations If):

Meets expectations if central ideas from notes are effectively recorded and poster includes definition (in own words) and a visual representation that EXPLAINS the meaning of the vocabulary word or concept.

Instructional Strategies:

- Quick-Write – Students complete quick-write prompt in on the first page of their researcher’s notebook. Students share responses in pairs. Next, students break down the task in portions with the teacher guiding students to interpret each sentence of the task.
 - Vocabulary
 - o Teacher provides direct instruction on essential investment vocabulary and concepts using a PowerPoint presentation. Students record central ideas of information using Cornell note-taking style (see appendix).
 - o Students are assigned vocabulary/concepts from their notes and will create posters to provide a visual definition of that vocabulary/concepts for the class.
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Accommodations and Interventions:

Provide sentence starters and/or “I will” statements for help analyzing the task Provide guided notes for students who need additional support.

NOTES**1 class period**

Read and annotate the LDC rubric using the following questions: What are the key words for each category? How do you distinguish the "meets" and "advanced" column for each rubric category?

Scoring Guide (Work Meets Expectations If):

Meets expectations if students annotate rubric and record responses to prompt in Research Notebook.

Instructional Strategies:

Model the annotation and response to prompt questions using the "Focus" category of the rubric. Encourage student responses as you model and highlight strategies for identifying key words and analyzing differences between needs and advanced categories.

Ask students to share their work with a partner and write down any discrepancy that exists between classmates in their analysis of the rubric categories. Teacher records those discrepancies on the board and invites class discussion to evaluate the rubric further and create a class consensus.

Accommodations and Interventions:

Identify specific rubric categories (two or three) for students to focus on.

Ask advanced students to translate each category into their own words.

Reading Process

INTRODUCTION TO STOCK MARKET RESEARCH: Ability to navigate online stock market resources available for research and understand how to identify appropriate sources (RH 11-12.7). *Ability to gather relevant information from multiple authoritative print and digital sources, using advanced searches effectively; assess the strengths and limitations of each source in terms of the specific task, purpose, and audience; integrate (WH 11-12.8).

LIST**2 class periods**

Journal - What kind of information should you look for when researching a company?

What would be important to you if you were going to invest in a company?

Use the "Navigating the Stock Market" guide to help you identify key investment research tools and navigate "google finance" as a resource.

Scoring Guide (Work Meets Expectations If):

Navigating the Stock Market assignment is completed with 90% accuracy.

Instructional Strategies:

Before taking students to the computer lab to begin completing the "Navigating the Stock Market", introduce and model the expectations.

Begin modeling by showing students how to look up Taco Bell on GoogleFinance.

Students will notice that Taco Bell is not an independent company and must read the company description to find out the parent company (YUM Brands). Show students the YUM Brands page on GoogleFinance and walk through the features of the page while students annotate a screenshot handout of the same page.

Next do a walkthrough of the instructions for the Navigating the Stock Market and the students will complete the rest on their own.

Notes:

Note - Much of the research students will do in this Navigating the Stock Market activity is focused specifically on the Walt Disney Company. This and the rest of the Reading Process mini-tasks are designed to support students by practicing and modeling how to research and analyze data and information on one common publicly traded company (the Walt Disney Company). When we transition to writing, students will read a sample report written on the Walt Disney company and they will already have strong knowledge of the company, helping them evaluate the sample with depth.

Accommodations and Interventions:

Highlight specific pieces of Navigating the Stock Market to respond to.

ACTIVE READING AND NOTE-TAKING: Ability to read and determine central ideas of the text and cite specific textual evidence to support analysis of the texts (RH 11-12.1,2) *Ability to integrate and evaluate multiple sources of information presented in diverse formats and media (e.g., visually, quantitatively, as well as in words) in order to address a question or solve a problem (RH 11-12.7). *Ability to evaluate an author's premises, claims, and evidence by corroborating or challenging them with other information (RH 11-12.8).

NOTES**3 Class Periods**

You will read information about the Walt Disney company to evaluate its value as a potential investment.

Annotating text and data recording: Use annotation techniques and other reading strategies to demonstrate your reading process and your level of interaction with the text. After actively reading the texts and data, record the main ideas and evidence in the metacognitive log.

Scoring Guide (Work Meets Expectations If):

- Annotated or “actively read” text has a variety of marks (circles, underlining, stars, highlights, etc.). Annotation also includes written questions, connections, and insights in the margins.
 - Use annotation rubric to provide students feedback on their reading
 - Notes include a variety of information and data recorded appropriately into the Metacognitive Log.
-

Instructional Strategies:

- Letter to the Shareholders and Disney Article #1 – Model active reading. Brief review of summary writing strategies. Use metacognitive log to support reading/writing activities to help students improve processing skills of main idea and significance. Students get independent work time to complete metacognitive log and summary. Students read and annotate article and complete summary and analysis on the information.
 - o In small groups, students will share analysis and discuss how they would implement it in

a paper.

- Read and annotate Disney Articles #2 & #3 independently and record information. Share analysis with partners.

Accommodations and Interventions:

Give students a dictionary handout of key vocabulary terms to help navigate some of the more difficult reading.

Provide advanced students an additional article on Disney to support their analysis of the company.

NOTES**3 days**

With a partner, you will choose a publicly traded company and using the skills learned in researching the Walt Disney Company, you will use your Research Notebook to collect data and information on your selected company in order to respond to the task.

Scoring Guide (Work Meets Expectations If):

Meets expectations if student have selected a publicly traded company, gathered appropriate evidence, and completed the research notebook.

Instructional Strategies:

There is very little instruction during this mini-task. Students will be doing research in pairs and teacher will support students as needed.

Accommodations and Interventions:

For students who need further support, select a company for students or allow students to continue further research on the Walt Disney Company.

ORGANIZING NOTES: Ability to integrate information from diverse sources, both primary and secondary, into a coherent understanding of an idea or event, noting discrepancies among sources (RH 11-12.9). *Ability to ... assess the strengths and limitations of each source in terms of the specific task, purpose, and audience (WH 11-12.8).

NOTES**1 class period**

Whole class practice: T-Chart

Prioritize relevant information gathered from your research on the Walt Disney Company in a T-Chart style of graphic organizer. You will use this as practice for their own research.

Brainstorm & T-Chart

After they have completed their independent research, students will brainstorm ideas for whether they would recommend this investment and then begin categorizing their evidence in a t-chart.

Scoring Guide (Work Meets Expectations If):

Meets expectations if student creates a prioritized set of notes that categorizes evidence.
Meets expectations if student suggests implications drawn from information about the company.

Instructional Strategies:

- Students place relevant information from the texts and their own background knowledge into the graphic organizer.
 - Students will prioritize the information in the graphic organizer in their research notebook by identifying which pieces of evidence they could use in their essay.
-

Accommodations and Interventions:

Provide students with specific examples of what kinds of information belongs in each section of the graphic organizer. Create a list of “leading questions” to help guide students in the process. Example: “What is one piece of evidence that would support an argument to invest in the company? What is one piece of evidence that shows the company is too risky?”

Transition to Writing

BRIDGING CONVERSATION: *Ability to explain the rubric and begin linking reading, notes, and discussion to writing task (RH 11-12.1). *Ability to engage in meaningful discussion by posing and responding to guiding questions and responding thoughtfully to diverse perspectives. Synthesize comments, claims and evidence made on all sides of an issue (SL 11-12. 1c/d).

NOTES**1 class period**

Scored Sample Report (based on the Walt Disney Company)

Read the sample report and score it for each category using the rubric. As you read, annotate and determine which two rubric categories are strengths for this report, and which two need the most improvement.

Share thoughts/analysis in small groups then whole class.

Scoring Guide (Work Meets Expectations If):

Meets expectations if sample report is scored with attention to detail and students have participated in class discussion.

Instructional Strategies:

- Scoring/Analyzing Sample Report:
 - o Students will read a sample report written in response to the task, evaluating the Walt Disney Company. Students will have already researched this company as a class and will

have a strong understanding of the information include in the report.

o Students will annotate and score the report independently using the LDC rubric.

Students will share their scores and what they believed were the “top two” and “bottom two” categories for the report.

- Discuss the process for writing the essay.

Struggling readers should focus on fewer rubric components such as Reading/Research and Controlling Idea.

Notes:

Struggling readers should focus on fewer rubric components such as Reading/Research and Claim.

Accommodations and Interventions:

Select three categories for students to focus on in the scoring.

Writing Process

ESTABLISHING A CLAIM.: Ability to establish a formal claim in response to the task, including a recommendation to the client (WH 11-12.1).

SHORT CONSTRUCTED RESPONSE

1 Class Period

- Write a formal claim in your Research Notebook using your quick-writes, notes, and data/information to ensure a strong controlling idea.
 - Write a draft introduction that will set the context for your thesis.
-

Scoring Guide (Work Meets Expectations If):

- Writes a thesis that establishes a claim and identifies key points that support development including a counterclaim and recommendation to the client.
 - Writes a draft introduction that sets an appropriate context for the thesis. Should be engaging in tone for the client.
-

Instructional Strategies:

- In pairs, students brainstorm qualities of a strong and weak thesis statement. Students will share as a class and teacher writes on board.
 - Introduce a sample thesis statement and evaluate as class.
 - After students have finished writing a formal claim, review the qualities of a strong opening paragraph: HOTT- Hook, Overview, Thesis, Transition.
 - In pairs, students share their claim statements and introduction. Student volunteers share their claim and introduction with the class for critique.
-

Accommodations and Interventions:

Provide students with sentence frames to help write the thesis.

PLANNING: Ability to create a logical organization of main points and evidence in an outline format needed for a report (WH 11-12.1).

OUTLINE

1 Class Period

Create an outline for the report in your Research Notebook, including key evidence from your research organized effectively.

Scoring Guide (Work Meets Expectations If):

- Applies an outline strategy to develop reasoning for the recommendation to the client.
 - Draws a credible implication from information about the company, including both its positive and negative investment features.
-

Instructional Strategies:

- Review text and essay requirements:
 - o MLA Citations, at least 4 sources, 2 pages minimum, typed, double-spaced, 12 pt font.
 - Students write outline in their partner team using the tools in the research notebook.
 - Extra Support – Students will focus on providing evidence from only one or two texts in their outline.
-

Accommodations and Interventions:

Students who need extra support can use fewer sources to support their recommendation.

DEVELOPMENT: Ability to write arguments to support claims and address counterclaims in an analysis of the topic/texts using valid reasoning and relevant and sufficient evidence (WH 11-12.1). *Ability to produce a clear and coherent report in which the development, organization, and style are appropriate to task, purpose, and audience (WH 11-12.4) *Ability to write routinely over an extended time frame (WH 11-12.10).

LONG CONSTRUCTED RESPONSE

2 Class Periods

Write a rough draft of your report consisting of 4-5 paragraphs. Includes an introduction, 2-3 body paragraphs and a conclusion.

Scoring Guide (Work Meets Expectations If):

Students have a rough draft completed that includes appropriate structure to organize reading material content and to explain key points related to the prompt.

Instructional Strategies:

- Review strategies for constructing body paragraphs: TEA – Topic sentence, Evidence, Analysis.
- Peer feedback – trade paragraphs and outlines between partner teams and give some general initial feedback in the form of questions only. Each partner team asks 3 questions of the partner team they are giving feedback to.

Accommodations and Interventions:

Specifically plan trading partners to support the feedback process.

REVISION AND EDITING: Ability to develop and strengthen writing as needed by planning, revising, editing, rewriting, or trying a new approach (WH 11-12.5).

LONG CONSTRUCTED RESPONSE**1 Class Period**

Using a peer review form, provide another group with feedback on their report. The feedback is organized by rubric category.

Use the feedback and your own revisions to write a final draft of the report.

Scoring Guide (Work Meets Expectations If):

- Provides complete draft with all parts.
 - Supports the opening in the later sections with evidence and citations.
 - Improves earlier edition.
 - Completes peer review of another report.
-

Instructional Strategies:

- Students give each other feedback on rough drafts using the “peer review template”.
 - Students can email essays to teacher for efficient and basic feedback.
 - Discuss strategies for citing information using the Research Notebook – MLA citation methods, quoting, paraphrasing.
-

COMPLETION: Ability to submit final piece that meets expectations.

LONG CONSTRUCTED RESPONSE

Turn in your complete set of drafts, plus the final version of your piece

Scoring Guide (Work Meets Expectations If):

- Fits the “Meets Expectations” category in the rubric for the teaching task.
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Instructional Strategies:

Resources

Uploaded Files

 [InvestmentResearchNotebook.pdf](#)

(http://literacybytechnology.s3.amazonaws.com/teacherresourceuploads/9647/503097133_Oct_08_2012_183852877.pdf)

Research Notebook

 [NavigatingthStockMarket.pdf](#)

(http://literacybytechnology.s3.amazonaws.com/teacherresourceuploads/9647/2021313172_Oct_08_2012_184016137.pdf)

Research Notebook Navigating the Stock Market

 [PeerReview-Investment.pdf](#)

(http://literacybytechnology.s3.amazonaws.com/teacherresourceuploads/9647/821781034_Oct_08_2012_184114967.pdf)

Research Notebook Navigating the Stock Market

 [Disney-MetaLog.doc](#)

(http://literacybytechnology.s3.amazonaws.com/teacherresourceuploads/9647/1669317680_Jan_05_2014_170815777.doc)

Metacognitive log - template to support students in analyzing information.

 [InvestmentResearch-Sample.doc](#)

(http://literacybytechnology.s3.amazonaws.com/teacherresourceuploads/9647/1430420627_Jan_05_2014_171111467.doc)

Sample Student Report - Walt Disney Company

Keywords

 T2X

*Links**

 [ecession's Upside: Better Ratings from Unhappier Viewers \(1020L\)](#)

(<http://www.mediapost.com/publications/article/95046/recessions-upside-better-ratings-from-unhappier.html>)

 [Hospitals turn to Disney for patient-satisfaction advice \(1250L\)](#)

(<http://usatoday30.usatoday.com/news/health/healthcare/health/healthcare/story/2011-09-22/Hospitals-turn-to->

 [The Walt Disney Company - Google Finance \(1250L\)](#)

(<http://www.google.com/finance?q=NYSE%3ADIS&ei=yUdzUKD4DKaoiALveA>)

 [Walt Disney Introduces Appmates Mobile Application Toys \(1330L\)](#)

(<http://galaxystocks.com/13897/business-news/walt-disney-introduces-appmates-mobile-application-toys-nyse>)

 [Letter to the Shareholders - Walt Disney Company \(N/A\)](#)

(<http://cdn.media.ir.thewaltdisneycompany.com/2011/annual/WDC-10kwrap-2011.pdf>)

* These Lexile measures were computed automatically and did not undergo human review. They are not certified measures and should not be published or recorded in any way.

Other Resources

Section 4: What Results?

Classroom Assessment Rubric

Not Yet	
Focus	Attempts to address prompt but lacks focus or is off-task.
Reading/Research	Demonstrates weak use of reading material to develop argument.
Controlling Idea	Establishes a claim and attempts to support an argument but is not convincing; (L2) Attempts to acknowledge competing arguments.
Development	Reasoning is not clear; examples or explanations are weak or irrelevant. (L3) Connection is weak or not relevant.
Organization	Provides an ineffective structure; composition does not address requirements of the prompt.
Conventions	Demonstrates a weak command of standard English conventions; lacks cohesion; language and tone are not appropriate to audience and purpose.
Meets Expectations	
Focus	Addresses the prompt and stays on task; provides a generally convincing response.
Reading/Research	Demonstrates generally effective use of reading material to develop an argument.
Controlling Idea	Establishes a credible claim and supports an argument that is logical and generally convincing. (L2) Acknowledges competing arguments while defending the claim.
Development	Develops reasoning to support claim; provides evidence from text(s) in the form of examples or explanations relevant to the argument (L3) Makes a relevant connection(s) that supports argument.
Organization	Applies an appropriate text structure to address specific requirements of the prompt.
Conventions	Demonstrates a command of standard English conventions and cohesion; employs language and tone appropriate to audience and purpose.

Classroom Assessment Task

No Classroom Assessment Task for this module

Exemplar Work

Uploaded Files

Comments

Author Notes

Other Comments