Welcome to the Survey of Digitization class for Spring of 2013! Your instructors are Tanya Clement and Quinn Stewart with the gracious consultation of Zach Vowell, Digital Archivist for the Dolph Briscoe Center for American History and the assistance of Parker Fishel, our fearless TA.

We meet on Wednesdays, 3 to 6pm, in UTA 1.210A.

This class is officially an introduction to the issues and trends in digitization initiatives and management, including project planning and management, asset delivery and management systems, interoperability and the importance of standards, copyright and other legal issues, metadata basics digital preservation, and specific digitization processes for documents, images, video, and sound. Three lecture hours a week for one semester. Unofficially, it's a fun class with lots of hands-on projects with real collections and archives and some theory (yes theory!) about the objects (text, images, sound, and moving images) we'll be digitizing.

Some questions we'll consider:

- Why digitize? What is the cultural significance of the collections or objects we'll be digitizing? And how will digitizing make them more accessible or preserve them?
- What are effective work flows that repurpose existing descriptive material, rather than creating new metadata?
- What are the most efficient work flows that keep costs reasonable but also follow prescribed standards for sustainability and preservation?
- How do we begin to create well-designed plans that evaluate the use of the digitized materials and the effectiveness of the methods employed in digitizing and displaying the materials?

Some collections with which we'll work:

- **UT Folklore Center Archives**: Established in 1957, the UT Folklore Center collected the recordings made by folklorists such as John A. Lomax, William A. Owens, John Henry Faulk, Norman McNeil, and Americo Paredes. The F series of the archives contain field recordings of church services, folk songs, jokes and riddles, fiddle contests, oral histories, and other sound recordings. In this course, we will digitize the typescript catalog of the recordings, with the hope that we can associate the text of the catalog with the digitized sound recordings.

- **Bob Bailey Studios Photographic Archive**: Comprised of over 500,000 images, the Bob Bailey Studios Photographic Archive provides a rich pictorial history of life in Houston from the 1930s through the 1990s. The Bailey brothers' archive features a remarkable variety of people and events including visits by touring movie stars and campaigning presidents; aerial views of the burgeoning Houston skyline; byproducts of the petroleum industry such as drilling rigs, oil tankers, and gas stations; large gatherings of crowds for parades on Main Street; and the interiors and exteriors of early movie palaces. In this course, we will digitize film negatives from the Bailey Archive.

- **Caldwell County (Texas) Oral History Collection**: The Caldwell County (Texas) Oral History Collection, 1976-1977, consists of 220, 90-minute audiocassette tapes, which pertain to the local history of Caldwell County. The Caldwell County Oral History Collection was established in July 1976 by the Voluntary Action Center of Caldwell County. In this course, we will digitize a selection of the 90-minute audiocassette tapes.

Grades will be broken down as follows:

- **Participation**: 10%
- **Digitization Portfolio**: 50%
- **Online Discussions**: 10%
- **Final Grant Project**: 25%
- **Topic Presentations**: 5%

We will use the following schedule in calculating final grades:

- **A** = 95-100
- **A-** = 90-94
- **B+** = 84-89
- **B** = 79-83
- **B-** = 74-78
- **C+** = 69-73
- **C** = 60-68
- **F** = <60
Course Modules

Week 1 (1.16): Text Digitization

Class

- **Digitization Lab: Scan F-Series**
  - **Tutorial:** Text page scanning

Week 2 (1.23): Why Digitize? What's digital preservation?

Class

- **Readings**
  - *Smith, Abby "Why Digitize?" CLIR Pub. 80, 1999*
  - *Hecker, Thomas. The Twilight of Digitization is Now. Journal of Scholarly Publishing Volume 35, Number 1, October 2003, pp. 52-62*
  - *OPTIONAL: Association of Research Libraries Recognizing Digitization as a Preservation Reformatting Method. 2004*
  - *OPTIONAL: North Carolina Exploring Cultural Heritage Online (ECHO). Digital Preservation. 2007*
  - *OPTIONAL- Price, Joseph LOC Optical Disk Project*

Discussion

- **Week 2 Discussion (1.23): Why Digitize? What's digital preservation?**
  - Jan 22 0.5 pts

Week 3 (1.30): Authenticity and Integrity

Class

- **Readings**
  - *Preservation and Access Education and Training.pdf*
  - *Digitizing Historical Records Grant Announcement.pdf*

Discussion

- **Week 3 Discussion (1.30): Authenticity and Integrity**
  - Jan 29 0.5 pts

Tutorial

- **Introduction to ABBYY Finereader 11**
Week 4 (2.6): Digitization and Metadata :: Zach Vowell, speaker

Class
Week 4 (2.6): Digitization and Metadata :: Zach Vowell, speaker
Feb 6

Readings

*MPLP: It's Not Just for Processing Anymore


*OPTIONAL: Dublin Core Metadata Element Set, Version 1.1

*OPTIONAL: Briscoe Center Metadata Schema and Style Guide

*OPTIONAL: Dublin Core Metadata Best Practices (CDP Metadata Working Group), Version 2.1.1 [Sections 2 and 3 (ppgs. 4-17), and skim through Section 4]

Discussion
Week 4 Discussion (2.6): Digitization and Metadata
Feb 5 0.5 pts

Digitization Lab: OCR F-Series
OCR Project Expectations

Week 5 (2.13): Copyright and Funding :: Speakers Carlos Ovalle, iSchool, and Nancy Meller, NHRPC

Class
Week 5 (2.13): Copyright and Funding :: Speakers Carlos Ovalle, iSchool, and Nancy Meller, NHRPC
Feb 13

Readings


*TED talk on fashion and copyright


*OPTIONAL: CCAHA A Race Against Time: Preserving AV Media, Audio Preservation 2009

Discussion
Week 5 Discussion (2.13): Copyright and Funding
Feb 12 0.5 pts

Digitization Lab: Grants and OCR F-Series

Week 6 (2.20): Mobile Scanning

Class
Week 6 (2.20): Mobile Scanning
Feb 20

Digitization Lab: Mobile Scanning, LBJ Library

Due:
*Grant Collection and Access Description
Feb 20 5 pts

*F Series Scans and OCR
Feb 20 7.5 pts

Week 7 (2.27): Camera Scanning

Class
Week 7 (2.27): Camera Scanning
Feb 27

Readings
*Bush, Vannevar. As We May Think. 1945.
**Organizing for Digitization at Oregon State University: a Case Study and Comparison with ARL Libraries**

**Success Factors and Strategic Planning: Rebuilding an Academic Library Digitization Program**


**Discussion**

* Week 7 Discussion (2.27): Camera Scanning
  
  Feb 26 0.5 pts

**Digitization Lab: Camera Scanning**

* Hide module contents  Add item to module

**Week 8 (3.6): Digital Asset Management :: Margie Foster and Zach Vowell, speakers**

**Class**

* Week 8 (3.6): Digital Asset Management :: Margie Foster and Zach Vowell, speakers
  
  Mar 6

**Readings**

* Choosing a Digital Asset Management System That’s Right for You
  
  * National Library of Medicine Digital Repository: Functional Requirements (ch. 7 & 8)
  
  * The Role of Digital Librarians in Digital Asset Management
  
  * Forrester_Wave_Digital_Asset_Management_Q2_2012.pdf
  
  * Who Should Enter Metadata in Digital Asset Management
  
  * Asset Metadata cataloging
  
  * OPTIONAL: Red Island Repository Institute 2011
  
  * OPTIONAL: CONTENTdm Information Sheet
  
  * Zach’s Week 8 Presentation Slides (Open Office)
  
  * Zach’s Week 8 Presentation “script”

**Discussion**

* Week 8 Discussion (3.6): Digital Asset Management
  
  Mar 5 0.5 pts

**Digitization Lab: Catch up**

* Hide module contents  Add item to module

**Spring Break (3.13)**

* Hide module contents  Add item to module

**Week 9 (3.20): Audio I: Justin Kovar, Briscoe Center, speaker**

**Class**

* Week 9 (3.20): Audio I: Justin Kovar, Briscoe Center, speaker
  
  Mar 20

**Readings**

  
    
    [Read "Introduction and Summary" and Chapter 1]
  
  * Sound of Silence by Glenn Fleishman, Boing-Boing
  
  * OPTIONAL: CLIR Capturing Analog Sound for Digital Preservation 2006

**Discussion**

* Week 9 Discussion (3.20): Audio I
  
  Mar 19 0.5 pts

**Digitization Lab: Audio cassette digitization and metadata**

**Tutorial**

**Due**

* LBJ Scanning and OCR
  
  Mar 20 7.5 pts

* Camera Scanning
  
  Mar 20 5 pts

* Hide module contents  Add item to module
### Week 10 (3.27): Audio II: US Presidential Archives Outreach, Heather Nice, George W. Bush Presidential Library and Museum

**Mar 27**

#### Readings

- "Lee Ann Potter, "Education Programs in the Presidential Libraries. " 2006 (Lee Ann is NARA's Head of Education)
- "Nancy Kegan Smith and Gary M. Stern, "Historical Review of Access to Records in Presidential Libraries," 2006 (Nancy is Director of the Presidential Materials Staff and Gary is NARA's General Council)
- OPTIONAL: Outcome Based Evaluations (IMLS)
- OPTIONAL: WebsiteSurvey.DOCX

#### Discussion

**Mar 26 0.5 pts**

**Week 10 Discussion (3.27): Audio II**

**Tutorial**

- Digitization Lab: Audio metadata and VHS Video Digitization

### Week 11 (4.3): Film and Video Digitization :: Justin Kovar, Briscoe Center, speaker; Briscoe Field Trip

**Apr 3**

#### Readings

- *Meeting the Challenge of Media Preservation: Strategies and Solutions; Indiana University Bloomington, Media Preservation Initiative Task Force, Public Version, September 2011 [Read Chapters 1-3].
- *CCAHA A Race Against Time: Preserving AV Media, Video Preservation 2009
- OPTIONAL: Video Preservation website
- OPTIONAL: Digital Tape Preservation Strategy
- OPTIONAL: AV Artifact Atlas

#### Discussion

**Apr 2 0.5 pts**

**Week 11 Discussion (4.3): Film and Video Digitization**

**Tutorial**

- Scanning a negative archival master

### Week 12 (4.10): Digitization in an Institutional Context :: Amy Bowman and Hal Richardson, speakers

**Apr 10**

#### Readings

- "Digitization and Researcher Demand"
- "Moving Theory into Practice - Cornell Digital Imaging Tutorial"
- "Picturing Success Digitization Manual Amy Bowman.pdf"
- "CAH_Digitization_Process_08.doc"
- OPTIONAL: NMPW_imaging_specifications.pdf

#### Discussion

**Apr 9 0.5 pts**

**Week 12 Discussion (4.10): Digitization in an Institutional Context**

**Tutorial**

- Scanning a negative archival master
Week 13 (4.17): Grantwriting

Class

- Week 13 (4.17): Grantwriting
  - Apr 17

Lab: Grant workshop

- Digitizing Historical Records Review Form

- Creating derivative images from negative archival masters

Week 14 (4.24): Film and Video Archive :: Megan Peck, TAM, speaker

Class

- Week 14 (4.24): Film and Video Archive :: Megan Peck, Texas Archive of the Moving Image, speaker
  - Apr 24

Readings

- OPTIONAL: National Film Preservation Foundation Film Preservation Guide

Discussion

- Week 14 Discussion (4.24): Film and Video Archive
  - Apr 23 0.5 pts

Lab: Complete image, audio, and video metadata

Tutorial

Due

- Bailey Scanning
  - Apr 24 5 pts

Week 15 (5.1): Final Grant Panel Review

Class

- Week 15 (5.1): Final Grant Panel Review
  - May 1

Discussion

Course Documents

Orphaned Readings

- Licklider, J.C.R. Man-Computer Symbiosis. 1960
- Microsoft Research: Context-Dependent Pre-trained Deep Neural Networks for Large Vocabulary Speech Recognition
- Fortner, Robert Rest in Peas: The Unrecognized Death of Speech Recognition 2010.
- ??? North Carolina Exploring Cultural Heritage Online (ECHO) . Metadata 2007
Participation

Participation means being an active member of the dialog. It consists of doing one or more of the following: being prepared for class and writing comments, by making observations about the readings and exercises, by asking questions, by staying on topic. In class, taking notes, actively working on in-class exercises instead of unrelated activities like email, chat and general web surfing, and actively listening lends to better discussion. It also means showing up and participating EVERY WEEK in the discussion online.

Please plan to attend all classes and arrive on time. Please be courteous to the collegial community we are creating this semester by not conversing with others during class lectures or writing emails, texting, or instant-messaging; be mindful during the labs that this is time is designed to give you guided practice with some of the digital tools you will need in order to complete your digital assignments.

Unexpected problems happen (serious illness, etc.), it is important to let us know so we can make appropriate changes to your schedule. If you will miss class because of a religious holiday, or travel, let us know as soon as possible so we can make alternative arrangements for this as well.

In many of our classes we will have time in class to get some practical experience with some of the concepts we’re learning during the lectures and through readings. These labs will not be collected but will be checked for completion.
**Topic Presentations**

**Goal:** Students will demonstrate a synthesized understanding of the materials for a given week by applying what they learn from the readings to the introduction of supplemental projects, information, standards, systems, experiences, etc.

**Submission:** EACH student should both submit their presentation and upload it to the [Topic Presentations](https://utexas.instructure.com/courses/915103/assignments/254312) page by the beginning of the class day on which the presentation is due.

In order for us to share our interests within the larger topic of digitization as well as keep one another up to date with cutting edge developments, each week a pair of students will give a 10-15 minute presentation and INSPIRE a 10 minute discussion on a current topic/event relevant to the focus of the week's readings. Please plan to treat these presentations professionally. These are not book reports or summaries of the readings. It is expected that the class has done the reading. The pair will be expected to make an argument based on their research and the readings that corresponds to their interests or background in information science (loosely defined to mean a variety of concepts from computer programming and design to archival theory to library and technology services). Feel free to include your own research or work experience: how does your research and/or work speak to these readings? Does it dovetail or contrast? Why?

The presentation format will require a formal visual aid such as a powerpoint (OR a Prezi, OR an infographic you've created on the topic, OR a handout, etc.). You will also need to provide the class with at least 4 citations for resources you used in gathering your information. That way, if students are interested in the presentation topic, they know where to look for more information. Presenters should be prepared to field questions from the class.

Presentation dates sign-up will be opened on [Collaborations](https://utexas.instructure.com/courses/915103/assignments/254312) after the first day of class. Plan on a 5-10 minute discussion in class. In order to be respectful of other students' time and needs, presentations and discussions will end at exactly 25 minutes (if not before).
Digitization Portfolio

Goal: Students will demonstrate an ability to produce digital surrogates that meet provided standards and parameters.

Your Digitization Portfolio will consist of the items you have digitized during the semester. All of these items except for the video need to be put into your sod_spring_2013 folder on the NAS, so we can access them for grading.

It is our hope that many of these projects will lead to items you digitized having permanent URL’s on the Web. Many items digitized during past iterations of this course have become publicly accessible exemplars of our shared cultural record.

Digitization Portfolio (50%):

Part one:
Text/OCR (15%):
F-Series and OCR, due by 3pm on 2.20
LBJ scanning and OCR, due by 3pm on 3.20

Images (10%):
Camera scanning, due by 3pm on 3.20
Bailey scanning, due by 6pm on 4.24

Part Two
Audio (10%)
Audio Sync (5%)
Video/Film (10%)
Grant Collection and Access Description

Due February 20 at 3pm. Please upload a Word Document, not a .PDF. This assignment should contain three parts:

Choice One: Digitizing Historical Records:

1. The first part should be at least three pages, double-spaced with 1 inch margins in 12pt:

   Begin with a brief overview of the project that explains the national significance of the historical materials and your methods. Then, explain how you selected the materials to be digitized. Relate that selection to the mission of your institution. Describe the nature and scope of your repository's holdings. Demonstrate that virtually all of your holdings are available to researchers and have online descriptions and that all new accessions receive a basic level of processing within a reasonable time.

   Explain in further detail the historical significance of the materials. Specify how the project's collections document individuals, events, developments, organizations, and places. Indicate how researchers already have used these collections by providing citations. Demonstrate the demand for the materials by providing usage statistics over the past three years*. Characterize the project's audience, and show how the activities proposed will increase public understanding of national history, culture, and experience.

   *In lieu of this requirement, students are encouraged to include citations in which the collections are used. If these are not discoverable, students can reference citations that refer to the use of like collections.

2. The second part should be between half and a full page.

   Explain your methods for providing free online access to these materials. (The Commission will not consider proposals where there will be a charge for access to the materials.) Include relevant portions of the existing finding aids or indexes in your proposal’s supplementary materials as well as a link to them if available online. Indicate the quantity of materials to be digitized (estimate by sampling the materials). Be sure to demonstrate that your institution has all necessary rights to digitize the collection(s) for delivery online to the general public. Restricted materials should either be excluded or make up only a small percentage of the materials.

3. Five annotated citations. This part should include five citations that show the collection in use or the topic represented by the collection discussed, or any other relevant citations that might show the importance of the collection. Annotations can be one sentence that explains why this collection is significant.

Choice Two Preservation and Access Education and Training

1. The first part should be at least three pages, double-spaced with 1 inch margins in 12pt:

   Significance and impact:
   Discuss how the proposed program will support efforts to preserve or improve access to humanities collections. This discussion should speak to the extent to which the program meets national or regional needs, the breadth of its impact on preservation and access practices, and the kinds of institutions and humanities collections that will benefit. Describe how this program relates to others of a similar nature that currently exist or have existed in the past. Clarify the degree to which this program will build on past work or break new ground. Estimate approximately how many persons would benefit from the proposed educational programs and services.

2. The second part should be between half and a full page.

   Institutional profile Provide general information about the applicant institution and explain why it is an appropriate provider of the education and training services. Include a description of the institution’s mission, organizational structure, annual budget and sources of income, and staff.

3. Five annotated citations. This part should include five citations that show the collection in use or the topic represented by the collection discussed, or any other relevant citations that might show the importance of the collection. Annotations can be one sentence that explains why this collection is significant.
Proposal Rough Draft

Due: April 14 at 11:59 p.m. Submitted in Canvas as a Word Document, not a .pdf.

Requirements:

1. Your rough draft for sections 1 and 2, including at least 100 words that cover the rest of section two in the narrative:

Indicate which digitization standards you intend to use, and why. Describe what kind of hardware and software you plan to use or develop to make these collections available online. Explain whether you plan to use a vendor for any part of the project and your selection process. If you plan to do the work in your repository, discuss what capacities you have and which you will need to develop (including personnel, training, equipment and software).

Explain how your proposed method of digitizing and providing access will ensure that users understand the context, content, and structure of the collection. Show how existing finding aids or other descriptive records will serve as the descriptive metadata for the digitized materials. Describe what kinds of searches and display methods you will offer the users and how these will take advantage of the existing information about the materials.

Explain how your preservation plans will protect the digitized surrogates beyond the end of the grant period.

Discuss how you will evaluate the success of your project. The Commission requires a final report that describes your results, along with recommendations regarding digitization for other repositories and a proposed business model for how you intend to continue archival digitization in the future.

2. 100 words each for sections 3 - 6.

3. Two Peer Reviews. The instructor will assign each student two peers to review by 7 am on Monday, April 15. Please come to class on Wednesday having reviewed read your assigned rough proposals in the rubric provided on Canvas.
Final Proposal

Final assignment: Write a grant proposal to obtain funds to (1) digitize historical records or (2) to create a training program for preservation and access for education and training.

Due April 28, 11:59 p.m. Each proposal should include:

- a 15 to 20 double-spaced-page (12pt type with 1 inch margins) narrative that follow the grant guidelines below
- citations

Your proposal should take the form of a project narrative that conveys the ideas, objectives, and methods of your project based on what we have learned this semester.

Choice one: This proposal will be a response to the Digitizing Historical Records grant program sponsored by the National Historical Publications and Records Commission, a part of the National Archives and Records Administration (NARA). Your proposal will be based on the Digitizing Historical Records Grant Announcement.pdf.

Your proposal should

Include sections 1 – 6 described in the announcement and a rough budget based on the parameters described in the Budget Categories section. Your proposal must demonstrate the following:

1. the national significance of the collections or records series to be digitized;
2. an effective work flow that repurposes existing descriptive material, rather than creating new metadata about the records;
3. reasonable costs and standards for the project as well as sustainable preservation plans for the resulting digital records;
4. well-designed plans that evaluate the use of the digitized materials and the effectiveness of the methods employed in digitizing and displaying the materials.

Choice two: This proposal will be a response to the National Endowment for the Humanities Division of Preservation and Access Education and Training Grants and will focus on a real grant that we are writing this semester to get funding for an updated training program here at the iSchool. (http://www.neh.gov/files/grants/pres-access-education-training-may-1-2013.pdf)

Your proposal should

Include sections 1 – 4 described in the announcement (#6 and #7 are optional) and a rough budget based on the parameters described in the Budget Categories section. Your proposal must demonstrate the following:

1. the significance and broad impact of the project for improving preservation and access practices;
2. the soundness of the methodology and the program's structure, curriculum, and evaluation plans in relation to its educational goals;
3. the professional training and experience of the staff in relation to the activity for which support is requested; and
4. the reasonableness of the project's budget in relation to anticipated results.

Because your peers on a review panel may not possess specialized knowledge of the proposed methods and historical field of study, the description should be free of jargon.

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Final Grant Project rubric

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<th>Ratings</th>
<th>Pts</th>
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<td>Includes all sections clearly marked, is 15-20 pages in length in 12pt type with 1 inch margins</td>
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<td>Demonstrates the national significance of the collections or records series to be digitized or the significance and broad impact of the project for improving preservation and access practices</td>
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<td>Demonstrates an effective work flow that repurposes existing descriptive material, rather than creating new metadata about the records or a sound methodology and program structure, curriculum, and evaluation plans in relation to its educational goals</td>
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<td>Demonstrates reasonable costs and standards for the project as well as sustainable preservation plans for the resulting digital records or a reasonable project budget in relation to anticipated results</td>
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<td>Criteria</td>
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<td>Demonstrates well-designed plans that evaluate the use of the digitized materials and the effectiveness of the methods employed in digitizing and displaying the materials the appropriate professional training and experience of the staff in relation to the activity for which support is requested</td>
<td>Full Marks 2 pts</td>
<td>2 pts</td>
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<td>No Marks 0 pts</td>
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<tr>
<td>Is well-written, free of grammatical and spelling errors and unclear jargon</td>
<td>Full Marks 2 pts</td>
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Total Points: 15
Final Review Panel

Final presentations will be structured as grant review panels. In the final class, students will be put onto panels to evaluate grant proposals generated by the class. Each panel will be made up of three to four students.

Requirements:

Before class, each student will be responsible for reviewing and discussing 3 grant proposals using the RD-ReviewForm.doc. The proposals you will review will be assigned to you by Prof. Clement by 6 a.m. on Friday, April 26 and will be made available to you in Canvas. Each review should include (as per the instructions on the form), a narrative evaluation (at least one page for each proposal) and the percentage scores. Please be prepared to defend your choices. Proposal writers will not see these comments unless you give them permission.

Submission:

Review forms MUST be submitted to Canvas by noon on the final presentation/exam day, May 1. Please zip them up and submit them to this assignment for full points.

Your discussion in class will be based on these reviews so be sure that you have access to your notes either in paper format or on a computer.

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