

**3rd CPF – GFIS Implementation
Group Meeting
May 3-4, 2005**

MINUTES

Global Forest Information Service - GFIS
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CPF - Global Forest Information Service (GFIS)

3rd CPF – GFIS Implementation Group Meeting,

May 3-4, 2005

CABI in Wallingford, UK

MINUTES

Participants:

Peter Mayer (IUFRO), Chairman

Magnus Grylle (FAO)

Eero Mikkola (GFIS Coordinator, secretary)

Joris Siermann (CIFOR)

Gillian Petrokofsky (CABI)

Eric Landis (NBII), observer

Roger Mills (Oxford University Library Services), observer

1. Opening of the meeting and adoption of the agenda

Peter Mayer, chairman of the GFIS Steering Committee (SC), welcomed the GFIS Implementation Group (IG) and the observers Eric Landis (NBII) and Roger Mills (Oxford University Library Services). Peter Mayer informed the participants that he would moderate the meeting on recommendation of the GFIS Steering Committee.

The roles of the Implementation Group and the observers at the meeting were specified in the following way:

- Principal discussion should take place between the members of the IG, and all agreements should be made only by the IG members.
- The observers could inform the IG of their opinions and experiences concerning the topics in question, and time for a separate presentation would be reserved for both observers.

The draft agenda of the main objectives of the meeting was adopted.

2. State-of-art

The main steps of GFIS since XII World Forestry Congress in Quebec, Canada, in September 2003 (CPF initiative, IG meetings, SC meeting, resources available in

2005, milestones, deliverables and a working plan until Brisbane, and the production version launched in March) were briefly described by the GFIS Coordinator.

CABI (Petrokofsky) asked how the first four data types, namely “Publications”, “Meetings”, “News” and “Vacancy Announcements” had been selected and if the IG had agreed on how constant that set of data types would be. CABI was informed that the respective decision had been made in the first IG meeting on the basis of information resources available at the sites of the GFIS partners and of the potential interest of users, and new data types such as projects and contacts/experts would be added after Brisbane once the four data types had been completed and tested.

The Implementation Group welcomed the progress of GFIS in different areas.

3. GFIS metadata standards

FAO (Grylle) presented the draft GFIS metadata standard website and draft metadata standards for the data types of “news”, “meetings”, “vacancy announcements” and “publications”.

At first, FAO (Grylle) presented the following three principles related to metadata management that should be considered at a certain level during the development process:

1. Unique ID for each information provider should facilitate metadata management by the information provider, e.g. tracing from where metadata come and combining metadata via different information resource types from the same information provider. The IG supported the idea of a unique ID.
2. For certain information types such as “News” it is reasonable to replace metadata records after a certain period when the metadata can be considered as outdated. The IG supported this principle and agreed that the principle should be developed further.
3. How should optional fields be dealt with in search functions: with free text search and/or metadata search? It was agreed that mandatory fields would be searched through metadata search and optional fields only through free-text search.

FAO (Grylle) said that the GFIS metadata standards were based on the Dublin Core metadata initiative and its work, and the Dublin Core Metadata Element Set

(DCMES) was used as the point of reference for the development of GFIS as agreed in the first Implementation Group meeting.

After discussing general principles, the IG dealt with agreed data types.

3.1 News

It was agreed for the “News” data type that

- “Date“, “Description” and “Identifier” were mandatory fields.
- “Category” was strongly recommended for an optional field.
- RSS 2.0 was to be used as an exchange type.

In that context NBII (Landis) noted that US information providers did not have experience with the RSS exchange type, but they would be interested in receiving more information about RSS.

3.2 Meetings

It was agreed for the “Meetings” data type that

- “Coverage“, “Date“, “Description“, “Identifier“, “Publisher“, “Title” and “Type” were mandatory fields.
- The definition for “Publisher” had to be checked.
- Online meetings would be included in the GFIS meetings and had to be defined based on existing definitions.

3.3 Vacancy Announcements

It was agreed that

- “Coverage“, “Date“, “Description“, “Identifier“, “Language“, “Publisher“, “Title” and “Type” were mandatory fields.
- “Duration” would be a mandatory field if a definition based on existing metadata schemes or standards could be found. If no definition was found, the field “Duration” would have to be removed.

3.4 Publications

First exciting Application Profiles (AgMES, AGRIS-AP and DC Library AP) for the “Publications” data type were discussed based on the document which CABI (Petrokofsky) had provided to the IG by email on 18 February 2005. After extensive discussion it was agreed that GFIS would adopt AGRIS-AP for publications because of the following arguments:

- GFIS should use existing standards.
- AGRIS-AP was the application profile developed by FAO and thus pre-built components and guidelines could be flexibly linked to GFIS by the core partner.
- There were actually no big differences between existing application profiles in practice.

It was agreed that

- “Creator”, “Date“, “Identifier”, “Language”, “Location”, “Subject”, “Title” and “Type” were mandatory fields for the “Publications” data type, and the remaining fields were optional ones which should be available on GFIS-AP, too.
- The definition for the “Date” field had been clarified.
- GFIS could adopt AGRIS-AP refinements for all fields, too, but those would have to be clarified first.
- The definitions for “Date” and AGRIS-AP refinements would be clarified by CABI (Petrokofsky) in communication with FAO (Margherita Sini and Magnus Grylle).
- Mandatory and optional fields as refinements should be available on the GFIS Metadata standards site.

General agreements and agreed actions for GFIS metadata standards:

- The whole set of GFIS standards with definitions must be based on the existing standards and definitions.
- The current version of GFIS metadata standards with definitions available on the GFIS website has to be checked by the IG and comments on the standards from the observers are also welcome. All comments will be sent to the GFIS Coordinator (Mikkola), who will prepare a summary from all comments.

4. Metadata management and search/browse tool

CIFOR (Siermann) presented a proposal on how to develop metadata management and search tools in GFIS. The following features were considered in the presentation:

4.1 Migration of prototype publications metadata

Forest metadata records available in GFIS and AGRIS:

- GFIS has collected about 130,000 bibliographical references.
- From 1996 up to now, AGRIS has accumulated other 60,000 records and there is a lot more material from the time before 1996 that had been collected since 1975.
- Combining this material will result in a repository of considerable strength.

4.2 Implementation of metadata harvesting and indexing including resources available

Forestry Open Archive Service (FOAS):

- The goal would be to develop a Forestry Open Archive Service (FOAS) combining the AGRIS and GFIS material into a single repository while adding additional resources available online to the mixture (news, meetings and vacancies).
- FOAS will automate the harvesting of resources using open standards and proven technology while providing a specific full-text search interface for resource discovery.
- FOAS as such will be a part of the larger GFIS.

FOAS objectives:

- Full-text search on partner websites, bibliographical data and non-bibliographical data (news, publications, meetings, vacancies etc).
- GFIS partners would contribute information to the FOAS in 3 ways:
 - Automated indexing/harvesting of partner websites,
 - Automated harvesting of bibliographical material, and
 - Automated harvesting of other resources.
- A centralised repository and management system would facilitate adequate performance and data quality based on predefined quality control rules.

The GFIS AP will be created by taking elements and refinements that already exist, such as:

- W3C RDF,
- Dublin Core
- AGRIS AP (AgMES, DC and AGLS)

All participants thanked CIFOR (Siermann) for a promising proposal and the whole item was discussed broadly in terms of technical implementation, re-harvesting of current metadata records, resources, time table before Brisbane, communication with current and potential partners, and quality control of metadata.

Resources available for technical implementation and maintenance of system by partners:

- The CIFOR representative (Siermann) remarked that he could reserve 50 percent of his working time for the development/implementation of GFIS until the end of June, before his contract with CIFOR terminated.

- FAO (Grylle) said that FAO could reserve enough resources for the technical implementation of GFIS before Brisbane and that FAO could maintain the system after Brisbane.

4.3 Inviting existing information providers to use the new standard

Current metadata and communication with the current information providers:

- The current GFIS information providers have to be informed of the development of GFIS, of a new GFIS Application Profile, of how information providers can update their metadata and that they can update their metadata in GFIS after Brisbane, if they do not have resources or time before Brisbane.
- Oxford University Library Services (Mills) asked what kind of tools GFIS could offer to the current libraries in GFIS in order to re-harvest their metadata from the current system into a new system. It was assumed that AGRIS-AP could offer pre-built tools and guidelines to re-harvest metadata to the new system, but this had to be clarified with FAO (AGRIS team) by the GFIS Coordinator.
- All partners agreed that the IG had to take care of migration of the current metadata records collected by the GFIS-Africa project, and FAO (Grylle) stated that they would take care of that.

Quality control:

- The IG is aware of the need for quality control of metadata records in GFIS.
- Technical filters will be implemented into the system immediately during implementation of the next version.
- The need for a person or team has to be considered in the long run.

It was agreed that the proposal would include the following advantages:

- It can be implemented based on existing tools/products and open software.
- The basic construction is simple and based on decentralized metadata management.
- The implementation will be documented.
- It can be implemented by resources of CIFOR and FAO.

Agreed actions:

- Although there are only three months until Brisbane, the updates of GFIS will be implemented and presented in Brisbane (August 2005). The updated functions will be implemented by CIFOR and FAO. CIFOR (Siermann) will update the proposal based on the comments received in the meeting and provide the next version of the proposal by Friday, May 13. Then the IG will comment on the proposal and, based on those comments, the final version of the proposal will be

provided and partners can agree on who does what. The next version of GFIS will be completed two weeks before Brisbane.

5. GFIS and information providers

At the beginning of this item, the different roles of partners and organisations and the concept model of GFIS were discussed broadly in terms of technical and strategic issues, and it was agreed that strategic issues should be dealt with later under item 8.2 “Topics for the Steering Committee”.

It was agreed that the role of the GFIS partners had to be defined more clearly in terms of partners and that it would go beyond the provision of metadata: GFIS could request in kind contributions/cash and usability of the node model has to be re-considered (service centres/information providers of previous GFIS organisations). It was agreed that the role of the partners had to be clarified when the GFIS concept model would be prepared.

It was agreed that an organisation/institution which provided forest-related metadata to GFIS could become a GFIS information provider (not only with links under the “Browse” function or domains under the “Google search”), and that the Coordinator could decide, based on that criterion, on who could become a GFIS information provider until the GFIS concept model would have been prepared. An organisation/institute which is willing to provide metadata from its own information resources and which is interested in becoming a GFIS information provider must send a letter/email to the GFIS Coordinator. The letter will be available in three languages on GFIS and it can be filled in and downloaded from the GFIS website. If an organisation/institute is interested in becoming a GFIS partner beyond metadata providing from its own information resources, a Memorandum of Understanding (MoU) will have to be prepared between IUFRO and the organisation/institute.

When the Coordinator has received the email/letter from an organisation/institute and it meets the criterion to become an information provider, the Coordinator sends guidelines on how to join GFIS and provide metadata to GFIS in practice to the nominated contact persons of the organisation/institute. The guidelines are being prepared.

FAO (Grylle) demonstrated a “Control panel” for GFIS information providers: For each information provider an individual website would be established. The information provider site would be restricted (user name and password needed) and through that individual site the information provider could update his/her contact information, information about his/her information resources and metadata

files. It was agreed that the GFIS Information provider control panel should be further developed.

6. IUFRO World Congress in Brisbane

6.1 GFIS presentations on Tuesday and Wednesday (August 9-10)

The Coordinator informed the participants that time slots for two GFIS presentations had been reserved for Tuesday (August 9) and Wednesday (August 10) from 6.15-6.45 p.m., and Mr. David Kaimowitz, Director General (CIFOR) and Mr. Hosny El-Lakany, Assistant Director-General (FAO) would be asked to open the presentations. The nature of the presentations was discussed. It was agreed that the presentations should be based on communication with the audience (interactive). They should not be a one-way presentation of what GFIS is and what it contains. A person who can give an excellent GFIS presentation is being sought.

6.2 A shortcut to GFIS on a bank of computers for delegates

A bank of computers for delegates will be established to use for email, e-Forum, and Internet search functions. It has been proposed that a shortcut to GFIS would be on the homepage of those computers. GFIS could be showcased as an example of a Forestry Portal, and information sessions on its functionality, and other relevant information tools could be demonstrated at various times during the day. It was agreed that the Coordinator had to investigate that option more deeply with the organiser.

6.3 IUFRO Special Programme for Developing Countries (IUFRO-SPDC) – pre-Congress training courses

GFIS will be presented and demonstrated to the participants of the pre-Congress training course on Friday, August 5, held at Gympie Training Centre. The aim of the course is to provide a comprehensive introduction to important forest information resources and tools and their efficient use.

CIFOR (Siermann) proposed that GFIS Asia partners should be informed of the training course and the Coordinator promised to inform those partners.

6.4 An extended technical meeting

An extended technical implementation meeting was proposed in order to invite existing and potential GFIS information providers to discuss metadata in terms of availability, standards and technical facilities. It was agreed that the Coordinator had to investigate that option more closely, and if an extended technical meeting were arranged its object and content would have to be defined clearly.

6.5 IUFRO booth and GFIS fact sheet

During the Congress GFIS is available the whole time through the IUFRO booth. A GFIS fact sheet is just being prepared and the contents of the fact sheet will be based on the GFIS Mission Statement and the layout on the CPF and GFIS designs.

The CABI representative (Petrokofsky) informed that she would be prepared to demonstrate GFIS at the CABI booth and distribute any GFIS material. In that context it was agreed that all GFIS partners would do the same at their booths if they were exhibiting.

7. Presentations by observers

7.1 NBII (Eric Landis)

1. Assignment to EL from NBII – Discover and document the new GFIS institutional arrangements, explore collaborative opportunities and make recommendations to NBII for how to provide support towards the continued implementation of GFIS and maintain the ongoing partnership with NBII's PNW Information Node representing the broader NBII network.

2. Questions from NBII and other US metadata providing organisations – The following questions are representative of those being asked by existing US metadata providers.

These questions come via e-mail, phone conversation and personal contact.

- a. Will GFIS be a going concern (business) and how will that be demonstrated?
- b. How will metadata contributions be made in the future and will the process be streamlined? If so, how?
- c. How are we measuring the effectiveness of GFIS?

- d. What is the business enterprise model for GFIS, e.g. who are the players and what are their roles? In particular, how does CPF function regarding GFIS business?
- e. What are the GFIS funding arrangements?
- f. What are the expected GFIS personnel arrangements? For instance, GFIS Coordinator, content editor, trainers, etc.

3. Review of benefits to NBII (and all GFIS partners) – The following potential benefits for GFIS partners are noted:

- a. Support NBII information sharing goal to “provide swift user access to biological databases, information products, directories, and guides maintained by Federal, State, and local government agencies, non-government institutions, and private sector organisations in the United States and around the world.”
- b. Enhance communication and potential collaboration with other international natural resource organisations through participation in GFIS meetings and activities.
- c. Improve linkages and the potential for project collaboration by NBII information providers and users to their information providing and using counterparts worldwide, be they scientists, policymakers, educators, managers, etc., e.g. information sharing as an gateway to project collaboration.

4. Past NBII contributions

- a. Provided promotional materials for Quebec presentation including graphic design
- b. Metadata training curriculum materials to Margarita Sini for GFIS training
- c. Served on GFIS taskforce from Brazil meeting forward providing advisory support
- d. Served on GFIS interim steering committee

5. Potential NBII contribution to GFIS

- a. From previous unsigned MoU
 - i. Metadata resource discovery in US – proactive discovery and collection of GFIS-relevant metadata records
 - ii. Metadata training – NBII maintains numerous accredited trainers and also conducts “train the trainer” workshops.
 - iii. Metadata quality control of records submitted through NBII node
 - iv. Promotional activities, e.g. giving presentations, posters, marketing support, etc.
 - v. Technical assistance as requested by GFIS

- vi. User support, e.g. reference assistance by phone for end-users, assist with new postings, etc.
- b. From ongoing or planned NBII activities
 - i. User needs assessment data (what users require by way of metadata fields, search and retrieval functionalities, etc.)
 - ii. Metadata development strategies, e.g. how to facilitate the development of metadata records by data providers (overcoming obstacles to metadata development)

7.2 Oxford University Library Services (Roger Mills)

Oxford Forest Information Service (OFIS) is managed by Oxford University Library Services with a brief to maximise use of its collections locally, nationally and internationally. It has worked closely with CAB International since 1938, and all its holdings since that date are abstracted in Forestry Abstracts and related CABI products. OFIS also has a long-standing working relationship with IUFRO and FAO, originally through their Joint Bibliographical Committee. Founded in 1908, it produced the first specialist international classification for forestry under the chairmanship of Oxford's professor of forestry, R.S. Troup, in 1934, which led to the development of the Oxford Decimal Classification for Forestry, published by CABI in 1953. An international 'clearing house' for forestry literature, planned by IUFRO in 1904, was never realised, but the Oxford/CABI partnership assumed this role in the 1950's and it continues to this day.

The Joint Bibliographical Committee eventually became IUFRO Working Group 6.03.00, Information Services and Knowledge Organisation. Over the past five years this group, currently led by Carol Green, Forestry Librarian at Washington State University, has focused its activities on developing forest information networks, and has produced a new directory of information services and libraries currently active in forest-related areas; this now contains around 150 contacts. Roger Mills has been nominated as leader of the group for the next five years following Carol's retirement at Brisbane.

Users of the libraries and information centres identified in the Directory are all potential users of GFIS, and their staff will form natural intermediaries between users and system. They could form a permanent support network for GFIS, helping to

- increase content
- promote use
- offer training

- provide feedback
- develop local networks
- support document delivery

and any other activities as desired. The IUFRO 6.03.00 group provides a formal, permanent communications structure, but its membership is not restricted to IUFRO members, including libraries from all sectors. It is thus well placed to form an effective 'user group', independent of GFIS itself but closely related.

Oxford University Library Services signed an MoU with GFIS in November 2003 as an information provider. Although unable to offer financial support or dedicated technical expertise, it is very willing to assist in the areas listed above, either independently or as part of 6.03.00 network. It is hosting an international conference *Frontiers in Forest Information*, in Oxford 5-7 December 2005, at which these ideas can be further elaborated.

7.3 Discussion

The IG welcomed the information and offered potential contributions from the observers. It was agreed that both observer organisations had expertise on a high level to contribute to GFIS (NBII e.g. metadata resource discovery in US, metadata training, metadata quality control of records submitted through NBII node, promotional activities, technical assistance and user support, and Oxford University Library Services/the Joint Bibliographical Committee e.g. increase contents, promote use, offer training, provide feedback, develop local networks and support document delivery). It was also agreed that potential contributions from the observers could be outlined before Brisbane but concrete actions/agreements would be made after Brisbane. In that context it was emphasised that a potential agreement had to contain the idea of a win-win situation so that both parties (GFIS and the partner) could profit from the cooperation in the long run.

8. Possible steps after Brisbane

8.1 GFIS Thesaurus

CABI (Petrokofsky) and FAO (Grylle) presented an idea of a GFIS Thesaurus. It was agreed that there was no need for a comprehensive Thesaurus at that stage but that CABI and FAO members on the IG would pursue the idea of adding important Thesauri and other keyword lists to a database as a first stage of developing a collection of resources that could at a later stage be cross-matched.

8.2 Topics for the Steering Committee: Partnership/Commitments of partners, Mission statement, GFIS Strategy

In the course of discussing this item, strategic needs for GFIS were discussed extensively. It was agreed that the message of how to make GFIS useful for all partners and especially for information providers was missing in GFIS.

It was agreed that the following GFIS topics should be dealt with by the GFIS Steering Committee:

- A financial strategy.
- A Concept/Business model should be prepared before Brisbane.
- Roles of different GFIS bodies (ToR should be prepared): CPF, the Steering Committee and the Implementation Group.
- Potential roles of non CPF members.

In this context it was agreed that the Coordinator would take care of the necessary modifications of the GFIS mission text available on the GFIS site. The mission text should be based on the official documents of GFIS, e.g. the CPF GFIS concept paper and meeting documents.

Before the meeting FAO (Peter Holmgren) had distributed by email the document "Proposed procedure for clearance of changes and responsibilities of maintenance for all GFIS gateway contents by FAO (Peter Holmgren, 27 April 2005)". IG agreed that clear procedures/responsibilities were needed, but because of shortage of time that issue would have to be dealt with later.

9. Other items

CABI (Petrokofsky) said that CAB could check and edit all texts on the GFIS website for clarity and grammatical correctness. The Coordinator would supply CABI (Petrokofsky) with the latest version of these texts. It was emphasised that CABI would not alter the content of the texts but only improve clarity or correct English language errors. The IG thanked CABI for its offer.

CABI raised a question on how the IG could improve its email communication and working protocol. It was agreed that the email exchange between the members of IG had the following priorities/principles before Brisbane:

- For the moment the most important issue was to get feedback for ongoing/existing processes. The feedback requests should include deadlines for the feedback.
- The second important issue was a general discussion of existing topics/ongoing processes.
- New proposals should not be made before Brisbane.

10. Closure of the meeting

The chairman emphasised the importance of the coming three months until Brisbane, thanked all participants and closed the meeting.