INNOVATIONS

THE CANADIAN MODEL FOREST NETWORK BULLETIN



January 2004 FEATURED IN THIS ISSUE

The Development of the Strategy
Working Together
Creative Funding Sources
Harvest Pressures and Contractors
Reforming Tax Policies
And much more...



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> www.modelforest.net ISSN 1497-5386



1681792-40062948

Poste-publications

PRIVATE WOODLOTS AND SUSTAINABLE FOREST MANAGEMENT IN CANADA

This issue of Innovations explores private woodlots across Canada — the challenges facing their owners and managers and the on-going quest for sustainable forest management that is the goal for all forest managers and the Canadian Model Forest Network.

Private woodlots are a familiar part of our everyday landscape and are near and dear to the hearts of many Canadians. Often found near densely populated areas, they add to the vitality of neighbouring communities and are a distinctive feature of rural Canada. When looked at in the context of sustainable forest management (SFM), private woodlots are usually owned by individuals, are relatively small, and may provide a portion of their owner's income.

While they are a valuable resource, private woodlots are not without their share of pressures and challenges. Competition between various types of land use, pressure on timber resources with the peaks and valleys of market prices for wood, taxation policies and wildlife habitat requirements are all major issues that face woodlot owners.

Although these are not new concerns for private woodlot management, they are becoming a greater preoccupation for industry, government and landowners across Canada and the major reason why the Canadian Model Forest Network (CMFN) created the Private Woodlot Strategic Initiative (PWSI).

PWSI was created to improve communication among private woodlot

- Ten percent of Canada's commercially productive forests are privately owned
- 425,000 individual forest owners manage this land
- These forests account for 19% of the country's annual timber supply

stakeholders and give them access to information on private woodlot management ideas and tools.

This valuable step comes at a time when private woodlot managers are starting to appreciate the value of networking as a means of staying in touch with their counterparts across the country. In the past, creative ideas and innovations tried in some parts of Canada were not passed along to other regions that could have used the information. With the PWSI in place, private woodlot owners and managers will have better access to available information and tools, coordination among stakeholders will improve, and the communications network of governments, wood-using industries, education and research institutions, professional associations, woodlot owners and their associations will be strengthened.

Publications Mail

FIRST THINGS FIRST — THE DEVELOPMENT OF THE STRATEGY

Stage I of the PWSI focused on getting a better sense of the current status of woodlot owners and the tools available to them. Comprehensive data from across the country on various woodlot projects was gathered by a small team of investigators and help from the people involved in these projects. With this information compiled into a compendium, it was possible to examine the projects and the ways they addressed specific SFM issues and woodlot owners' concerns. The data were analysed through the filters of the Canadian Council of Forest Ministers' (CCFM) six general criteria defining SFM and through the National Forest Strategy. During Stage II, a report was prepared describing the kinds of issues addressed, the approaches taken and the kinds of legacies to be left behind as tools for private woodlot owners in their pursuit of SFM.

Stage III was the gathering of more than 200 stakeholders at a national conference in Fredericton, New Brunswick in 2001, appropriately called "A Window on Woodlots." At this forum, the compendium was presented, new strategies were identified and existing ones examined for their adaptability to other locations. The compendium is available at www.modelforest.net



PWSI has helped establish a network of organisations and individuals across Canada concerned about private woodlots and has created unique opportunities for information exchange. The next steps of the Initiative will be to develop an action plan on how this newly formed network will work together to meet the various challenges woodlots are facing.

Much of the information in this issue of *Innovations* is drawn from the compendium and its analysis: *In Support of Small Private Forests in Canada: Summary of Strategic Woodlot Initiatives.*

WORKING TOGETHER

The Canadian Model Forest Network has created a number of strategic initiatives to help people to pool their creativity, energy and resources in working toward sustainable forest management. Local Level Indicators, Aboriginal Involvement and Private Woodlots are some of these current initiatives.

The common theme in all of these initiatives is networking. In the Private Woodlot Strategic Initiative, networking is the means for woodlot owners and related groups to share knowledge and experiences and learn from one another. Sharing helps them stay abreast of new ideas and activities, which may help them manage their woodlots sustainably and successfully.

CREATIVE FUNDING SOURCES

A key issue for those concerned about SFM on private lands is the lack of funding available. When stakeholders were interviewed during the data-gathering phase, they voiced the common opinion that SFM practices and woodlot owner education are both under-funded and depend strongly on government agencies. In their view, without financial incentives to promote SFM practices, their adoption on private lands will likely remain low.

Innovative funding programs are being developed to encourage SFM in private woodlots. In Nova Scotia, for example, the province created the Future Forest Fund Association as a mechanism for wood buyers to inject funds into silviculture. Under this plan, a private company creates a stewardship program in which a certain percentage of the price of wood is reinvested in woodlot management. This program is managed by a board composed of two woodlot owners, two company employees and two Nova Scotia Department of Natural Resources staff. The Association manages an annual budget of \$500,000 and has worked out a price structure for silvicultural treatments. Participating woodlot owners have access to the fund on a first-come, first-served basis. Although woodlot owner participation is not compulsory, 800 to 1000 owners have adhered to the program, which requires them to follow certain forest stewardship and wildlife protection guidelines.

Other initiatives/tools:

- Guaranteed 30-year loans for management work to be completed, as well as for machinery
- Subsidized technical assistance from woodlot associations and governments
- Bulk purchase of seedlings by a woodlot association for subsequent sale to landowners, which reduces seedling prices

REACHING OUT

Up to now, participation by woodlot owners in forest management has often been limited due to lack of knowledge about sustainable woodlot management and a lack of appreciation of the benefits of doing so. Issues like the economic and environmental benefits of management, effects of harvesting on the ecosystem, and non-timber and wildlife values of woodlots are not well understood. To address this, a number of projects aimed directly at the woodlot owners themselves were developed to provide sound management advice and technical assistance.

The Fundy Model Forest for example, developed a project to protect ecologically significant sites on its land base. In order to do this, they meshed private stewardship agreements with an educational program that provided woodlot owners with needed information to identify and manage these sites.

They created an information package and distributed it to interested woodlot owners, their associations, community groups, conservation groups and others. A leaflet entitled What is in Your Woodlot? was designed to help woodlot owners identify eco-sensitive sites, understand their importance and become aware of the different conservation options available to protect them. This leaflet was produced as a partner to the manual, Conservation Guidelines for Ecologically Sensitive Forested Sites on Private Woodlots Within the Fundy Model Forest, which targets forest technicians but is also available to the public. It is divided into "community types" and provides recommendations for each type, along with a list of contact information for woodlot owners wanting more information on their options for stewardship agreements.



Other initiatives/tools:

- Demonstration sites to observe SFM and Best Management Practices
- Reference materials
- · Walking trails
- Network of demonstration sites
- Newsletters
- Training programs
- Proper chainsaw use
- Wildlife habitat improvement
- Woodlot safety

MARKET STRATEGIES

Access to stable markets and buyers is critical to the success of products from small woodlots. Woodlot owners are more vulnerable to the normal fluctuation of wood and wood-product prices. As well, they can face competition from markets outside their province, or from the larger forest companies, especially in US markets. But creative woodlot owners often develop value-added industries, secondary manufacturing or pursue certification as ways to offset these challenges.

Woodlot owners in North East Saskatchewan for example, found that working together was key in meeting this challenge head on. With approximately approximately 250,000 hectares of privately-owned forest land under their management, they were getting very little return on their management efforts. The landowners made it clear they were dissatisfied with prices being paid by major forest companies and that they needed to gain a greater yield from this resource.

Under the umbrella of AgroForestry Products Inc., they were able to work co-operatively and with a unified voice. They improved their approach to marketing of the forest resource through group marketing initiatives and were able to improve communications among themselves by disseminating information on sustainable forest management practices, through workshops, newsletters, and seminars.



The efforts of AgroForestry Products Inc. have paid off, increasing awareness of the value of the forest resource on private land. The group also actively searches out market opportunities for members, provides a unified voice in discussions with markets and government, and gains better access to developmental funds. The group has held discussions with a mill and manufacturing plant proponent, obtained financial support from Saskatchewan Agriculture and Food, received in-kind support from Saskatchewan Economic and Co-operative Development Saskatchewan Environment and Resource Management, and continues to pursue other activities.

Other initiatives/tools:

- Joint pilot project Forest Stewardship Council-Eastern Ontario Model Forest (EOMF):
 - Explore the feasibility of FSC certification in the Great Lakes/ St. Lawrence (GLSL) region;
 - Demonstrate the possible benefits of forest certification to woodlot owners;
- Develop information materials for landowners; and
- Provide services to woodlot owners within the GLSL and EOMF regions.
- Québec Federation of Wood Producers/marketing boards, and Groupements forestiers
- New Brunswick Marketing Boards/Wood Co-ops

HARVEST PRESSURES AND CONTRACTORS

Across Canada, woodlot owners are concerned about the amount of wood harvested on private woodlots and the price they can obtain for it. The general impression is that stumpage rates on Crown lands, lack of incentives to manage private forests appropriately, and the high return owners can receive for selling their wood to the United States are putting pressure on private lands to increase the timber supply. Landowners and contractors are both impacted by these pressures but in different ways. Their business relations can experience difficulties if objectives are not clearly defined and agreed upon.

The Fédération des producteurs de bois du Québec, a federation of marketing boards, developed a *Contract Template for* Woodlot Owners and Contractors to formalize the relationship between the two parties. It was found that contractors did not necessarily respect the published Sound Practices Manual for Private Woodlots, nor their agreements with woodlot owners. The use of this contract in Quebec identified the need to develop two types of contracts: one to cede the rights to harvest, and the second as a business contract.

Within the Nova Forest Alliance, it was the contractors themselves who decided to develop a *Best Management Practices Manual* to guide them in building effective relationships with woodlot owners, and understanding and incorporating *Best Management Practices* into their logging and silviculture operations. The manual is



unique in that contractors wrote it for other contractors and includes information on contractor/landowner negotiations to ensure all parties understand the requirements of Best Management Practices.



WHEN: February 15-17, 2004 WHERE: Kemptville, Ontario

Topics discussed will relate to the contributions of stewardship initiatives on private woodlots to sustainable forest management in Canada.

- Draft woodlot stewardship report
- Woodlot stewardship field tour
- In conjunction with the annual Kemptville woodlot workshop
- Registration: \$50

For more details and draft agenda, please consult www.modelforest.com, or contact Michael Slivitzky at mslivitz@nrcan.gc.ca or at (613) 995-5842

MANAGING THE LANDSCAPE



Landscape management is particularly challenging on private woodlots due to their small size and the increasing fragmentation of forested land. Owners are sometimes blamed for causing the loss of viable riparian areas and stressing wildlife on their lands. Even though woodlot owners and private forest stakeholders are concerned about land conversion and fragmentation, the solutions to minimize impacts on the landscape are elusive.

To address these issues, a variety of management tools were developed to apply forest management plans on a wide scale within a region. One example is the approach taken by the Woodlot Association of Alberta. This group decided to develop a comprehensive forest inventory in the White Area category of Alberta's land, which is predominantly private land in agriculture.

Other initiatives/tools:

Bas-Saint-Laurent Model Forest

- Interactive computer software tool developed to incorporate wildlife objectives, notably target habitat for small game species, into woodland management plans.
- Simulation software which calculates the volume of sustainable timber harvests using information such as forest system characteristics and potential impacts from various management activities.

Fundy Model Forest

- Regional management plan developed through a public consultation process by the SNB Marketing Board and the Fundy Model Forest.
- Watershed management plan developed by the Southern New Brunswick Wood Cooperative and the Greater Fundy Ecosystem Research Group.

The inventory included various characteristics such as geographic extent and distribution, composition, state of maturity, estimated wood volumes, soil moisture regime, and ownership. Out of this inventory, maps were created which are highly useful tools when combined with data on wildlife habitat, fisheries, land ownership,

flood risk, and other information. Changes to forest cover can also be monitored as inventories are updated. Clearly, the inventory has provided a considerable amount of information which will provide a better understanding of how SFM is best applied to private woodlots in Alberta.

REFORMING TAX POLICIES CAN HELP

According to interviewed landowners, government support and commitment towards sustainable woodlot management is often considered lacking or inadequate. Many landowners have expressed concern that it is difficult to manage forested land at the full residential tax rate. One unfortunate result of this problem is that market forces, such as land development and the strong demand for wood products, can contribute to poor forestry practices.

Taxation policy is one avenue governments can use to promote SFM on private forests. In Québec, following the 1995 provincial summit on private woodlots, a task force of eight government, industry, municipal and private forest representatives was set up to establish a more favourable system for private woodlot owners to manage their forests sustainably. It recommended a natural production tax based on site characteristics, which allows a landowner to improve the stand's quality without being penalized. It also encourages woodlot owners to adopt a sustained yield management system, which reduces the annual tax payment. In addition, it encourages reforestation of the best sites, eliminates outside pressure for premature harvests, and generates a steady income for municipalities. This analysis was eventually used in the review of municipal legislation.

Around the same time, the Québec Ministry of Natural Resources created an income tax credit equivalent to 85 per cent of the property tax for all woodlot owners who engage in forestry activities on their land. The operations must be endorsed by a professional forester and their total cost must be greater than the property tax.

In Alberta, anyone who inherits land is required to pay higher taxes on forested lands that are part of the estate because of their higher value. This encourages the liquidation of mature forest when the landowner passes away. The Woodlot Association of Alberta challenged this by attempting to convince the Canada Customs and Revenue Agency to change tax policy so that woodlot management and conservation would be encouraged, rather than discouraged.

Tax reform is a slow process, but there is momentum building from other sources (i.e., Standing Senate Committee on Agriculture and Forestry) and there is a strong possibility that reform will take place around this issue.

In 1996, the Ontario government revamped a property tax program for managed forests. This had been a program where landowners received a tax rebate of 75 per cent of the taxes paid on qualifying forest land. Later this

plan evolved into a tax incentive program which saw the development of a Managed Forest Tax Incentive Program. Landowners interested in participating had to prepare a management plan for their property and have it approved by provincially certified plan approvers. The Plan ensures that only good forestry practices are prescribed and allows for the property to be reclassified and reassessed as managed forest.

In 2003, as part of an overall movement to the use of market value assessment as the basis for property taxation in Ontario, some woodlot assessments increased dramatically. This has resulted in considerable hardship for some woodlot owners. Within the last decade they have needed to consider several, considerably different, taxation regimes as part of their woodlot financial planning. This instability has had an especially marked effect for those landowners faced with the intergenerational planning of their woodlot.

These taxation developments have underlined the need to foster a better understanding by taxation authorities of the specific challenges of woodlot management. Woodlots are managed on a long term basis, and provide a host of benefits to society including clean air and water, wildlife habitat and recreational opportunities. Many of these non-market benefits provided by woodlots make our rural landscape a more pleasant and healthier place to live, and need to be recognized by government in terms of tax policies. These policies need to be built in order to encourage wise, long term stewardship of the woodlot resource, rather than the poorer stewardship practices that can result from fiscally necessary reactions to changing tax regimes. 🦚



PRIVATE WOODLOTS AND THE 1998–2003 NATIONAL FOREST STRATEGY

The value of forests and their management to Canadians are described in the 1998–2003 National Forest Strategy (NFS) Sustainable Forests: A Canadian Commitment. The recently developed compendium, In Support of Small Private Forests in Canada: A Summary of Strategic Woodlot Initiatives looks at how the listed woodlot initiatives address the nine strategic directions of the National Forest Strategy, especially those which address the role of private woodlots in SFM. These strategic directions can be grouped into four categories:

FOREST ECOSYSTEMS AND FOREST MANAGEMENT

For private woodlots to be well-managed, forest managers must see the forests as a source of multiple benefits, carrying out a wide range of functions. Some initiatives focus on improving forest knowledge and forest management practices which incorporate a variety of woodlot values, and on providing economic incentives to modify forest practices. Others focus on developing tools to distribute the information to all interested parties.

PUBLIC Participation and Aboriginal Peoples

More and more, people are interested in forest management because it affects users and neighbouring communities, both directly and indirectly. To achieve SFM, some initiatives recognized the diversity of stakeholders and of their responsibilities, and called for various levels of public participation.

Demonstration sites, public tours and reference documents are examples of various initiatives that brought the general public and woodlot owners together. Other initiatives included public participation in the development of projects and on committees relating to private forest issues.

Aboriginal participation was limited to a small number of initiatives where representatives participated in planning meetings, but were not included in project implementation. Additional financial resources, as well as inclusion of First Nation woodlands into woodlot initiatives, are required to improve Aboriginal participation.

THE FOREST INDUSTRY, COMMUNITIES, AND THE WORKFORCE

Communities and industry rely on sustainably managed forests to remain productive in the immediate and distant future. Some initiatives have focused on the promotion of SFM practices that include a long-term management framework compatible with the forest's natural processes to help ensure the long-term success of woodlot development.

Other initiatives focussed on increasing the demand for sustainable forest products through agreements between manufacturers and woodlot owners thus providing a stable price for products, and through third party certification which can also increase the marketability of wood products.

Community sustainability was also considered a requirement in reaching SFM. Where expansion of the work force was possible, initiatives offered training programs to increase employment and develop skills within the community. Where expansion was not possible, projects promoted the development of alternative forest products and local entrepreneurship.

FOREST SCIENCE AND TECHNOLOGY Management

Woodlot owners face many challenges that call for partnerships and cooperation, which can take a variety of forms. Most inventoried initiatives demonstrate how the private sector, together with research and governmental institutions are essential to the understanding and addressing of private woodlot challenges, such as implementing SFM on small and fragmented lands. A great deal of research is being completed to identify new forest management practices and to observe their effects on woodlot systems and the kind of economic benefits they can generate. Many efforts have been undertaken to better characterize the resource, allowing for better suited operations, and potential improvement of woodlot quality and diversity.



HOT ISSUES

Surveys showed that landowner objectives and values for woodlots are often led by conservation, recreation, and aesthetic interests. Yet government publications on woodlot management often appear to consider woodlots first and foremost as a source of timber. It would seem more appropriate to find a balance in promoting all forest values.

The emphasis on timber harvesting may have dissuaded some private landowners from pursuing any form of woodlot management. Management objectives and programs following from policies need landowner input in their definition. This may help build trust between landowners and related organisations and work towards greater mutual understanding.

Otherwise, landowners may not explore the variety of benefits of SFM out of fear interests other than their own may be forced upon them.

Public participation in forest management of woodlots as outlined by the National Forest Strategy and the CCFM criteria is needed. Although this may be difficult because landowners ultimately have the final say in managing their lands, increasing management activities will affect surrounding populations, who in turn will demand more public input in woodlot management.

Aboriginal involvement in woodlot management has clearly been overlooked, considering its importance as outlined in the National Forest Strategy and the Canadian Council of Forest Ministers' criteria. Building relationships with Aboriginal communities should take a higher priority if Aboriginal values are to be incorporated into regional SFM plans for private woodlots.

Opportunities for woodlot owners to create partnerships and networks will help them face greater environmental constraints and global pressures. Just as the importance of the role of woodlots at a regional scale is being acknowledged, so is the recognition of their role beyond national boundaries.



WATER QUALITY AND INTEGRATED WATERSHED PLANNING CHARTING THE FUTURE

An assimilation of expert knowledge in an environment designed to fill knowledge gaps and provide direction and focus to organizations struggling with water quality objectives in the Integrated Watershed Planning process.

WHEN: June 17 to 19, 2004
WHERE: Delta Beausejour, Moncton,
New Brunswick

For more information www.fundymodelforest.net

























RECENT PROGRESS

Analysis of the initiatives in the Private Woodlots Compendium identifies where private land stakeholders have accomplished progress towards SFM, and where some gaps remain. It gathered useful information about SFM tools, policy and techniques available to woodlot owners and their organisations across the country. And it made a strong case for consolidating such information. Greater accessibility to this knowledge would generate learning and networking opportunities, increasing the level of understanding between stakeholders. This set the stage for woodlot owners and others to work in collaboration on issues not yet adequately addressed by past initiatives.

The outcomes of the initial stages of the PWSI recognized the commonalities across the country and justified the need for woodlot owners to work together. An extensive woodlot owner engagement process was undertaken by the Canadian Model Forest Network during 2002-2003. Woodlot owner challenges and priorities were identified and documented during a Canada-wide series of regional workshops (Edmonton, Amherst, Prince George and Kemptville), involving some 150 participants. These facilitated workshops were organized with the help of local woodlot representatives and model forest general managers and staff. The workshops were designed to identify the key barriers to achieving SFM

on privately held woodlands in Canada and to identify potential projects the Model Forest Program could launch to help overcome these barriers.

A workplan was developed using information gathered during these workshops, and was subsequently presented and accepted at the Canadian Model Forest Network meeting in Ottawa in April 2003. This workplan does not address the entire range of issues identified by the woodlot community, but pursues those priority initiatives which also contribute to the achievement of Canada's Model Forest Program objectives.

WHERE TO FROM HERE?

As this issue of *Innovations* is going to press, support is being gathered for implementation of the new 2003–2008 National Forest Strategy (NFS) which was presented to the National Forest Congress in May 2003. Private woodlots figure prominently. One of the eight strategic themes of the NFS is devoted entirely to the contribution of private woodlots to sustainability (see Objective 7). The CMFN is a signatory to the new 2003–2008 Canada Forest Accord, and will be working actively with the NFS

Objective 7: Increase the economic, social and environmental contribution by Canadian woodlot owners to Canadian society through a concerted effort by stakeholders to strengthen policies and services that encourage and support viable woodlot businesses. (National Forest Strategy, 2003)

Steering Committee throughout the term of the NFS to achieve the implementation of its Objectives and Action Items.

The Private Woodlot Strategic Initiative of the CMFN is currently implementing its workplan. The two main themes of the workplan are Strengthening the SFM Private Woodlot Network and Gaining Societal Support for SFM on Private Woodlots. Initiatives to be carried out this year include the development of a who's who, web-based directory to increase understanding and networking among private woodlot owners. This directory should provide a comprehensive listing of organizations available to help landowners locally, provincially and nationally.

In order to enhance the effectiveness of communication, a project will work towards describing the woodlot owner target audience through the compilation and analysis of previously conducted surveys. The PWSI is also planning to

organize an annual national woodlot workshop for each of the next four years, with a view to developing consensus on a common vision of SFM on woodlots in Canada. Another project will seek to engage groups which have a shared interest in SFM on woodlots, but who have not partnered directly with woodlot owners or organizations in the past.

Under the theme of Gaining Societal Support for SFM on Private Woodlots, two projects are currently in development. One will expand the current knowledge of the contribution to society of SFM on woodlots, while the other will examine ways landscape level planning and management can be accomplished by many different landowners working in cooperation. All these projects will be undertaken in the spirit of collaborative consensual partnership that has made the CMFN an internationally recognized success story.

XIITH WORLD FORESTRY CONGRESS

The Canadian Model Forest Network had a significant presence in the exhibit hall at the XIIth World Forestry Congress. The Congress, held September 21-28, 2003 in Quebec City, attracted four thousand delegates from around the world. The high calibre and variety of exhibits set the stage for many special events and gatherings of delegates and members of the public.









AND FINALLY... ONE OF THE MANY SUCCESS STORIES



The Manitoba Forestry Association saw great potential to develop markets for their non-timber forest products within the province. Public awareness about the value of these products as an income generator for landowners however, was low. To address this problem, the Manitoba Forestry Association Woodlot Program held public awareness seminars using videos of proper harvesting and processing methods for a variety of products, followed by question-and-answer sessions.

The seminars also promoted the completion of woodlot management plans based on non-timber forest product development. Landowners attending the seminars made numerous requests for management plans. In some cases such as maple syrup production, alternative products were so popular that field days were organised to demonstrate the most appropriate management practices.

Other products being promoted in Manitoba include specialty mushrooms, jams and jellies from berry-producing shrubs, medicinal plants, and Christmas trees. All in all, a successful strategy was created to increase public awareness of the value of the forests and of forest products, and to continue the promotion of SFM to landowners in Manitoba.

To find out more ...

Look for the Private Woodlots Compendium at www.modelforest.net or get in touch with us at:

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CANADA'S MODEL FOREST PROGRAM

The Government of Canada, through the Canadian Forest Service, launched Canada's model forest program in 1992 to address the challenge of balancing the extensive range of demands we place on our forests today with the needs of tomorrow's generations. A network of model forests representative of Canada's diverse forest ecosystems has since been established to bring together individuals and organizations striving to make the goal of sustainable forest management a reality.

Each model forest in the Canadian Model Forest Network provides a unique forum where partners can gain an understanding of other stakeholders' views, share their knowledge, and combine their expertise and resources to develop innovative techniques, tools and approaches to sustainable forest management. Model forests act as giant, hands-on laboratories in which leading-edge techniques are researched, developed, applied and monitored. The network also has the mandate to transfer the knowledge and techniques it develops so the benefits derived from its work can be shared with other forest stakeholders.

This bulletin contains just a small sampling of the activities undertaken by Canada's model forests. For more information:

please visit our Web site at: www.modelforest.net

or contact:

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