Annex D

Framework, Timeline and Outline of 2009 Overview Report
10 November 2008

Overview Report Framework

1) Audience (The Who)
   a) Senior decision makers and leadership
   b) Domestic & international opinion and sector leaders who influence the sustainable management of forests and senior leadership

2) Objective (The Why)
   a) A strengthened perception of the Montreal Process as a tool to enhance the sustainable management of forests.

3) Document Purposes
   a) Inform senior decision makers, opinion and sector leaders on how, through working together, the Montreal Process helps countries respond to domestic and global forest-related issues
   b) Build awareness among the audience of the value of the Montreal Process and thereby enhance and maintain political support & commitment for it.

4) Examples / Case Studies / Story / Vignettes (2-pagers) (The How)
   a) Communication Mechanisms
      i) Demonstrate Montreal Process countries’ progress toward the sustainable management of forests
      ii) Show how Montreal Process helps respond to domestic and global issues
      iii) Demonstrate value of Montreal Process & working together
      iv) Show how countries are using criteria & indicators
      v) Display vignettes of how criteria & indicators influenced policy and direction
      vi) Use of criteria & indicators to influence future policy & direction
   b) Indicators
      i) Highlight appropriate and varied indicators from each criterion that respond to the priority issues
   c) Country Representation
      i) Each of the 12 Montreal Process member countries should be visible in the document

5) Issues (The What)
   a) List of Top Four Priority Issues (complete list detailed below)
      i) Climate Change
      ii) Biodiversity
      iii) Energy
      iv) Water
   b) Key Filtering Questions used in selection of top priority issues.
      (1) What issue will have the greatest impact to the audience?
      (2) Which issues can the Montreal Process countries clearly demonstrate engagement and success?
      (3) How may the Montreal Process countries weave the indicators into the issues & examples?
(4) What are the objectives to present with each issue?

6) Process to Move Forward
   a) Initial Top Four Issue Focus
      i) Drafting Group has some flexibility to work through priority issue list
      ii) Draft Group Lead will utilize the ‘Guiding Matrix’ to solicit member country case studies
   b) Drafting Group
      i) USA – Peter Gaulke (Lead), Japan – Mr. Goto, Mr. Sato (Liaison Office), NZ – Tim Payn, Canada – Simon Bridge, Argentina – Pablo, Chile – Andreas Mesa (?), Communications Writer (journalistic skills)
      ii) Japan (Liaison Office) invite country representatives to attend drafting group meeting
   c) Timeline, including check points
      i) See below
   d) Resources available (funding & in kind support)
      i) Japan will host the Drafting Group meeting (March 2009), w/ some travel support
      ii) Costs:
         (1) Staff Time – Each country supports their own staff time (in kind support)
             (a) Australia commits to support the tabular & numeric data to support the report
         (2) Design & Layout – Australia will explore opportunities to provide design and layout expertise in English
         (3) Printing Costs – Support for printing to be determined at June WG meeting.
         (4) Drafting Group Meeting. – Liaison Office to provide Meeting logistics w/ some travel support
         (5) Writing & Editing (communication / journalistic skills) – New Zealand and Canada will explore opportunities for in kind support.
         (6) Translation – USA commits to funding contract translation services
         (7) Distribution (Mailing) - Support for distribution to be determined at June WG meeting.
## Overview Report Timeline

<table>
<thead>
<tr>
<th>Date</th>
<th>Task</th>
<th>Responsible</th>
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| November 2008 (19th WG meeting) | • TAC presents WG with a proposed structure, desired content, and specific steps for the ‘Report’  
• WG to task TAC to prepare a draft report based on an agreed arrangement  
• Identify a drafting-group (DG) of WG and TAC members plus communications expert, to prepare the report  
• Synthesis of set of issues common to multiple countries  
• Identify preliminary sub-set of country specific examples  
• Finalization of report framework, outline & resource commitments | TAC Convenor Working Group Drafting Group |
| December 2008     | DG Lead writes skeleton draft report w/ 2-page format.  
▪ Send to all countries  
▪ Formal request to provide examples  
▪ Request early indication of the type of examples available | Drafting Group Lead |
| January 2009      | Examples, text, photos, graphics and other materials provided by countries  
▪ Establish a central electronic access site for comments and additions (aka WIKI) | Member Countries |
| February 2009     | DG Lead collates examples, text, photos, graphics and other materials for Drafting Group Mtg.  
▪ No editing, only preparation of materials for March mtg. | Drafting Group Lead |
| March 2009        | Meeting of Drafting Group  
▪ Draft document format  
▪ Draft Introduction  
▪ Draft 2-page examples  
▪ Draft close out | DG |
| April 2009        | First draft report provided to WG for review w/ 30 day comment response | WG/DG/LO |
| May 2009          | Address WG response into a 2nd draft report  
▪ Accomplished electronically | DG |
| June 2009         | Final draft to WG for review & clearance  
▪ Country Clearance of Examples  
▪ Technical & Journalistic editing | DG/LO |
| June 2009         | WG endorsement of final draft document  
▪ Accomplished at WG Face-to-face Mtg.  
▪ Final approval of English text version | WG |
| July 2009         | Formal design and layout | WG |
| August 2009       | Translation of English version into other languages  
▪ Approval of Translated Text | DG/Contractor |
| August 2009       | Final English and translated drafts printed | Contractor |
| September 2009    | Printed reports in Argentina | LO |
| October 2009      | Launch of Montréal Process 2009 ‘Overview Report’ | WG |
### Overview Report Outline

1) Front Cover Page (pg 1)
2) Inner Cover w/ publication information (pg 2)
3) Introduction (pg 3)
   a) First Impression – Here’s how we are going to help you – Connection to People
   b) Here are the issues and here is how MP helps respond to them
   c) N.B.: Consider some text drafted for 3rd Edition Booklet
4) Series of 2-Page Examples (pgs 4 – 11)
   a) Consider 4 – 6 individual 2-page examples
   b) N.B: Acknowledge some examples may be one page
5) Close-out / Wind-up (pg 12-13)
   a) Conclusions, Observations and Next Steps
6) Back Cover Page (pg 14)

### Sprinkled Throughout Document

Did you know facts; Who we are; Numbers on Montreal Process Countries’ position in the world (e.g. size of our forests) Quotable quotes
n.b.: Document needs to be in multiples Support for printing to be determined at June WG meeting of 4-pages

### Overview Report – Guiding Case Study Matrix

(Draft Group Lead will utilize the ‘Guiding Matrix’ to aid the solicitation of member country case studies)

<table>
<thead>
<tr>
<th>ISSUES</th>
<th>USES</th>
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<tbody>
<tr>
<td></td>
<td><strong>Use of C&amp;I for Measurement</strong></td>
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<tr>
<td>Climate Change (C5)</td>
<td></td>
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<tr>
<td>Water (C4)</td>
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<tr>
<td>Biological Diversity (C1)</td>
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<tr>
<td>Energy (C5)</td>
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Overview Report Issues
(As developed by WG during brainstorming session)

1) Climate Change (6)
2) Water (6)
3) Biodiversity (5)
4) Ecosystem Service (5)
5) Energy (4)
6) Adoption of C&I at Multiple Levels (3)
7) Improve Livelihood of Forest Communities (2)
8) Landscape Scale Progress (2)
9) Certification (2)
10) Trade (1)
11) Role of C&I in Focusing Research (1)
12) Poverty & Hunger (1)
13) Fire (1)
14) Forest Policy (1)
15) Contribution of C&I to SFM (1)
16) Desertification (1)
17) Loss of Forest Cover (1)
18) Forest Degradation (1)
19) Illegal Logging (1)
20) Forest Values (0)
21) Progress on C&I (0)
22) Carbon (0)
23) Community Perceptions of Forests (0)
24) Protected Area Status (0)
25) Enabling Environment (0)
26) Environmental Reputation (0)