**Terms of Reference**

**Framing and facilitation of Dialogs for a Water Secure Mexico**

1. **Background**

Mexico is facing a transition in 2018. Firstly, both the federal government and the legislative body in Mexico will be renewed; and secondly, there is great uncertainty regarding the long-term relationship between Mexico and the United States, as a result of the ongoing negotiations around the renewal of the North American Free Trade Agreement (NAFTA) and discussion around import/export taxes, among other aspects. However, these challenging times also present an opportunity for brokering longer-term agreements on strategic matters of importance for Mexico, by promoting a public discussion which should be above and beyond political or economic concerns, such as environmental preservation, and in particular water resources, which have been declared by successive governments a “strategic issue of national security”.

Given the aforementioned context, The Nature Conservancy (TNC) is planning a multi-stakeholder dialog, to commence in 2018 but to continue in the coming years, with the following objectives:

* Seek a common non-partisan understanding of the key issues that the public-at-large and the next government authorities should attend as a top priority to ensure better water resources Management in Mexico.
* Based on this understanding, formulate a non-partisan public analysis addressing pros and cons of different policy recommendations, and when appropriate formal legal proposals, as input for public policy frameworks related to water.
* Create a network of organizations which, from a non-governmental and non-partisan perspective, share a vision and an agenda for long-term water security in Mexico.
* Promote this vision with key target audiences, both public and private, through different means of communication including social media.

This will be achieved through six dialogs on specific topics, as well as the engagement of different stakeholders throughout this process, and using the information generated to feed into both a public and non-partisan communication and outreach process, and by providing awareness-raising materials and activities based on objective and fair expositions of the relevant policies, as input to key processes, including the process of formulating priorities for the next term of office in the federal government and the legislature.

The proposed topics of the six dialogs are currently defined as follows, to be confirmed and designed in consultation with a proposed steering committee, currently in the process of being constituted:

1. How to sustainably fund the necessary investments in water in Mexico
2. What alternative water sources can reduce pressure on traditional supply sources?
3. What can be done to make information and data available to support decision making?
4. Does the privatization of water exist in Mexico and does it contradict the human right to water?
5. How to reconcile grey and green infrastructure for water security in Mexico
6. How to generate a long-term water governance in Mexico

The present terms of reference define the support expected of a consultant who will be hired to facilitate this process. These terms of reference cover two separate contracts, the first from April to June 2018 focused on the first two dialogs (phase A), and the second from July 2018 to January 2019 focusing on the latter four dialogs and awareness-raising materials (phase B). While the two contracts will be legally separate, it is hoped that the same consultant could take on both, in order to have continuity throughout the process.

1. **Objectives of the consultancy**

Based on the aforementioned objectives of the process, this consultancy will look to finalize the definitions and facilitate the start of the process, as described below in the following key outputs, separated into the two phases mentioned above:

**Phase A: setting the basis and getting the ball rolling**

* In consultation with the dialogs steering committee, finalize the scope, speakers/facilitators and key questions and for each of the six planned dialogs, in order to ensure a logical sequence between the dialogs, in Spanish;
* Produce draft policy briefs (approx. 4 pages each) for the first two planned dialogs, in Spanish, and consult with key opinion leaders on the subject of each dialog, including the keynotes speakers, to fine-tune and finalize the policy briefs;
* Ensure a multi-stakeholder audience of interested, knowledgeable and influential individuals proactively take part in the dialogs;
* Produce a summary of areas of consensus or of disagreement at the first two dialogs, describing pros and cons of the different alternatives discussed (approx. 2 pages each), in Spanish;
* Building on recommendations from the first two dialogs, provide technical, economic analysis, business or policy cases and other input for the process of formulating legal and policy proposals where relevant, to be hired through a separate consultancy;
* Develop an outreach strategy to be deployed subsequent to Presidential elections with key administrative/executive bodies and other target audiences, to be identified;
* Produce by-lined op-eds on the subject matter of the first two dialogs, in Spanish (approx. 750 words), and consult with the appointed named authors in order to fine-tune and finalize them;
* Produce a synthesis of the lessons learned in phase A, in English, with an eye on replicating this experience in other geographies around the world.

**Phase B: continuing to push the process and using the input to further the agenda**

* Produce draft policy briefs (approx. 4 pages each) for the final four dialogs, in Spanish, and consult with key opinion leaders on the subject of each dialog, including the keynotes speakers, to fine-tune and finalize the policy briefs;
* Produce a summary of areas of consensus or of disagreement at the final four dialogs (approx. 2 pages each), in Spanish;
* Produce by-lined op-eds on the subject matter of the final four dialogs, in Spanish (approx. 750 words), and consult with the appointed named authors in order to fine-tune and finalize them;
* Building on recommendations from the final four two dialogs, provide technical, economic analysis, business or policy cases and other input for the process of formulating legal and policy proposals where relevant, to be hired through a separate consultancy;
* Support the deployment of the outreach strategy subsequent to Presidential elections with key administrative/executive bodies and other target audiences, to be identified;
* Produce a synthesis of the lessons learned in phase B, in English, with an eye on replicating this experience in other geographies around the world.
1. **Scope of Work**

Two aspects of this scope of work are expected in this consultancy, more prevalent in each of the two phases:

**Phase A: Analyses and Engagement:**

The input for the process described above is the best experiences available in terms of policy frameworks, or actions taken by non-governmental actions when appropriate policy frameworks were lacking, to solve the particular issues focused on in each of the individual dialogs. These experiences may come from Mexico or elsewhere, and from different organizations, and the lessons learned through these experiences should be presented in a way that facilitates their understanding by a broad audience, as well as their potential replication in the Mexican context.

These models/experiences will be analyzed in order to understand the feasibility of replicating them under the current Mexican policy framework, or where necessary, what legal changes would be necessary in order for them to be implemented. This input will feed into a separate and more detailed legal analysis. Facilitated process for multi-stakeholder engagement, involving ongoing discussions with key organizations from civil society, intergovernmental organizations, academia and business, who could potentially be affected by the adoption or adaption in Mexico of schemes such as those identified.

**Phase B: Messaging and Outreach:**

The analyses and engagements should be designed and facilitated with the intent to ensure the information prepared will feed into an appropriate awareness-raising and outreach strategy with different key target audiences, including the federal executive and legislative arenas.

1. **Deliverables**

**Phase A:**

1. Final scope, speakers/facilitators and key questions and for each of the six planned dialogs, in Spanish;
2. Two final policy briefs (approx. 4 pages each) on dialogs 1 and 2, in Spanish, discussed and approved based on stakeholder consultation;
3. Summary documents of areas of consensus or of disagreement at the first two dialogs (approx. 2 pages each), in Spanish;
4. Two by-lined op-eds on the subject matter of dialogs 1 and 2, in Spanish (approx. 750 words), approved in consultation with the respective authors;
5. A draft outreach plan to promote the areas of consensus among key decision makers;
6. A synthesis document, in English, to share the lessons learned in phase A, with an eye on replicating this experience in other geographies around the world;
7. An on-line document repository with all of the relevant information generated during phase A, including contact details of stakeholders, reference documents, meeting notes and PowerPoint presentations used.

**Phase B:**

1. Two final policy briefs (approx. 4 pages each) on dialogs 3 and 4, in Spanish, discussed and approved based on stakeholder consultation;
2. Two summary documents of areas of consensus or of disagreement at dialogs 3 and 4 (approx. 2 pages each), in Spanish;
3. Two by-lined op-eds on the subject matter of dialogs 3 and 4, in Spanish (approx. 750 words), approved in consultation with the respective authors;
4. Two final policy briefs (approx. 4 pages each) on dialogs 5 and 6, in Spanish, discussed and approved based on stakeholder consultation;
5. Two summary documents of areas of consensus or of disagreement at dialogs 5 and 6 (approx. 2 pages each), in Spanish;
6. Two by-lined op-eds on the subject matter of dialogs 5 and 6, in Spanish (approx. 750 words), approved in consultation with the respective authors;
7. A synthesis document, in English, to share the lessons learned in phase B, with an eye on replicating this experience in other geographies around the world;
8. A final, attractive communication document, in Spanish and English (approx. 16 pages each), to promote the process and its results to a broad audience;
9. An on-line document repository with all of the relevant information generated during phase B, including contact details of stakeholders, reference documents, meeting notes and PowerPoint presentations used.
10. **Timeline of deliverables**

|  |  |  |
| --- | --- | --- |
|  | **Phase A** | **Phase B** |
| **Product** | **Apr 18** | **May 18** | **Jun 18** | **Jul 18** | **Aug 18** | **Sep 18** | **Oct 18** | **Nov 18** | **Dec 18** | **Jan 19** |
| Delivery of product i | X |  |  |  |  |  |  |  |  |  |
| Delivery of product ii |  | X |  |  |  |  |  |  |  |  |
| Delivery of product iii |  |  | X |  |  |  |  |  |  |  |
| Delivery of product iv |  |  | X |  |  |  |  |  |  |  |
| Delivery of product v |  |  | X |  |  |  |  |  |  |  |
| Delivery of product vi |  |  | X |  |  |  |  |  |  |  |
| Delivery of product vii |  |  |  |  |  |  |  |  |  |  |
| Finalization of the first contract |  |  | X |  |  |  |  |  |  |  |
| Delivery of product viii |  |  |  | X |  |  |  |  |  |  |
| Delivery of product ix |  |  |  |  |  | X |  |  |  |  |
| Delivery of product x |  |  |  |  |  | X |  |  |  |  |
| Delivery of product xi |  |  |  |  |  | X |  |  |  |  |
| Delivery of product xii |  |  |  |  |  |  |  | X |  |  |
| Delivery of product xiii |  |  |  |  |  |  |  | X |  |  |
| Delivery of product xiv |  |  |  |  |  |  |  |  | X |  |
| Delivery of product xv |  |  |  |  |  |  |  |  | X |  |
| Delivery of product xvi |  |  |  |  |  |  |  |  |  | X |
| Finalization of the second contract |  |  |  |  |  |  |  |  |  | X |

1. **Financial terms**

The total amount of the contract is 45,000 USD, to be divided into two separate contracts:

* 22,500 USD for the first contract, from April to June 2018;
* 22,500 USD for the second contract, from July 2018 to January 2019.

Under phase A, 20% of the amount will be paid upon receipt and approval of product i; 40% will be paid upon receipt and approval of products ii and iii; 25% will be paid upon receipt and payment of products iv and v; and the final 15% will be paid upon receipt and payment of products vi and vii.

Under phase B, 10% of the amount will be paid upon receipt and approval of product viii; 20% upon payment and receipt of products ix and x; 10% upon receipt of product xi; 20% upon receipt of products xii and xiii; 20% upon receipt and approval of product xiv; and 20% upon receipt and approval of products xv and xvi.

**Please send all proposals via email by COB April 11 to: Colin Herron at cherron@tnc.org.**