

## **A 'PASEO' Approach: Regionally contextualized and integrated engagement, dialoguing, knowledge sharing and communication**

**by Tonya Schuetz and Abby Waldorf**

### **Introduction**

In research for development (R4D) and programmatic research work for development knowledge sharing and knowledge management, engagement and networking is essential for achieving behavioral change. R4D is about making sure research is contributing to positive development agendas and changes. We need to engage and communicate internally within our projects with the potential users of our results who can influence and implement change. It is important to clearly distinguish—from the beginning—the difference between this 'internal communication', what we will refer to as the 'paseo approach', and corporate communications.

Corporate communications is a management function responsible for overseeing and coordinating the work done by communication practitioners in different specialist disciplines, such as media relations, public affairs, copywriting, and graphic design. Van Riel (1995)<sup>1</sup> defines corporate communications as "an instrument of management by means of which all consciously used forms of internal and external communication are harmonized as effectively and efficiently as possible, with the overall objective of creating a favorable basis for relationships with groups upon which the company is dependent." The key terms in this definition are 'favorable' and 'harmonized'. Corporate communications will always put a 'positive spin' on any unfavorable news and will always present a 'unified' image of the organization. Corporate communicators in research institutions often adopt the discourse of the private sector, hence the references to 'target audience' and 'repackaging' and 'information products'.

This document will elaborate the key characteristics/principles/good practices of what we aim for in internal project communications, the 'paseo approach', and what it requires in terms of processes, competencies and skills in the people who undertake it. The paseo approach requires much more than communications. There will be elements of key requirements and also indications of training sessions in particular to develop awareness and competencies within the teams, and to allow them to practice and learn amongst themselves before moving to a wider audience.

In the first part, we will explain where we come from and the coining of the new term 'paseo' to avoid any association and connotations with the term 'communications' or 'communicators'. The second part gives an overview of the key spectrum of responsibilities and tasks that are necessary to introduce, as there is a need for additional hands-on, project-integrated and supportive regional knowledge sharing and engagement-focused activities. The third part lays out why it is important that we improve on the complementary responsibility and role of a 'paseo' within a R4D context. In the fourth part, we discuss some practical approaches for how

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<sup>1</sup> Van Riel, C.B.M. (1995), Principles of Corporate Communication. London: Prentice Hall, p. 26. In Jose, D. (2010), Defining Corporate Communications. Retrieved 24 June, 2014 from [http://www.sagepub.com/upm-data/39352\\_978\\_0\\_85702\\_243\\_1.pdf](http://www.sagepub.com/upm-data/39352_978_0_85702_243_1.pdf)

to engage in the paseo approach. Case examples from four CPWF basin programs are presented in an annex.

## Part 1: Where We Come From and a ‘New’ Way of Working

There is a lovely word, “paseo”, which means “a path set aside for walking”. It’s a very uncommon word, so when people ask about it you can say, “The Paseo is our engagement, knowledge management and communications facilitator”. Its main attraction is that it’s a completely new word, and as such comes with no baggage. See also box 1.

The term ‘paseo’ encompasses a whole spectrum of responsibilities, roles and tasks that need to be integrated into our research projects, programs, themes, flagships, and overall on-going work. This is not a one-person job but a real team effort. Thus, the ‘paseo approach’ refers to the paseo role within each member of a project or regional program. This approach can be facilitated and supported by the Paseo, i.e. a specific, designated member of the team who is responsible for identifying and accompanying paseo competencies and skills.

In our R4D approach the key to achieving change and impact is engagement with the partners, stakeholders, and policymakers that projects aim to influence. This is not something that a single person can achieve. This is an activity in which all members of a project or program must be involved.

It complements and forms a bridge with corporate communications, which is already well embedded in the Centers and the CGIAR Research Programs. (See below for a short excursion on what we understand as corporate communications.) The building of a paseo is not an initiative in competition with corporate communications. Research communication has conventionally been seen as a by-product and by-process of research efforts. Research results are produced and disseminated. A poster might be made, a manual, a policy brief, or a glossy brochure for donors. Just as research methods and approaches have to change in the new research for development paradigm so does communications’ role in the process. The roles and responsibilities encompassed in a paseo approach are in most cases spread across a whole team, as it is more than a one-person job and goes beyond the production of materials by focusing heavily on engagement, partnerships, and social networks.

### Box 1: Origin of ‘Paseo’

Spanish, from *pasear* to take a stroll from *paso* passage, step from Latin *passus*  
*First known use: 1832*

1a: a leisurely usually evening stroll: promenade

1b: a public walk or boulevard

2: a formal entrance march of bullfighters into an arena

source: <http://www.merriam-webster.com/dictionary/paseo>

## Part 2: Spectrum of Responsibilities and Roles in a Paseo Approach

*The achievements of the team are the combined efforts of each individual.*

The key to a paseo approach is to identify the strengths and weaknesses of the people involved in a project so that the wide spectrum of responsibilities can be covered, gaps identified and filled.

Below is a list of concepts and attributes that are key parts of the paseo spectrum of responsibilities and tasks. The list was deduced from CPWF program- and basin-level experiences. (See annex 1, which briefly presents four basin cases.)

The spectrum of the paseo responsibilities can be best described through a set of attributes in a person's behavior and competencies and skills. Both are equally necessary to move successfully along an impact pathway. A clear impact pathway for a common goal within a program/project will enable the entire team to embody the paseo approach and will provide unified direction for their communications activities. However, there could be a specific person on the team, the Paseo, who is responsible for ensuring that the paseo approach is adopted and who can be specifically held accountable for ensuring that these roles and responsibilities are filled and supported.

Necessary attributes for a Paseo and project team members include:

- integrative, inclusive;
- engaging, open; and
- opportunistic.

Some key elements that are very basic and yet important to get right in a paseo approach are: respect, loyalty, transparency, honesty, and trust.

The set of competencies required in a team are listed below. Often, different members of the team will embody different competencies. The complementary role of a Paseo will fit within these competencies and strategize to maximize them. The entire paseo approach requires everyone to have a clear and common understanding of the intended outcomes of the research.

- Understand the environment, and context, and able to contextualize concepts, approaches, flexibility and adaptive management;
- Understand the social capital in a group and the need for linkages to policy-makers, young professionals, corporate communications, etc. Connect people and making connections;
- Know how to work with an impact pathway and a theory of change towards a common goal within a program/project;
- Know and understand how to define and reach audiences and implementing partners;
- Forge connections, partnerships and build and maintain relationships; and
- Foster knowledge sharing, trust building, dialoguing and negotiating.

**Paseos ensure that they are listening, learning and understanding internally before communicating externally.** Part four elaborates a series of paseo skill sets that build towards the competencies listed above.

### Part 3: The Paseo Value-Added

*Building a team of strong and appropriately skilled paseos will help programs achieve their goals.*

Paseos with strong skills in listening, storytelling, networking, and engagement will be critical for solidifying partnerships and creating an environment for information sharing. When communications responsibilities fall on one member of the team, or outside of the team, a disconnect between research, development, and communications processes often occurs. The paseo approach ensures that the skills of every member of the program are maximized. For example, a person skilled in reaching policy makers can be valuable to the project and regional work of the program. The responsibility of the Paseo will be to make sure that these skills are maximized, utilized, and compliment each other and ensure gaps are filled.

***The paseo approach helps facilitate change along the impact pathways.*** This fits into the impact pathway approach where we - ideally as a team - make explicit how we anticipate things to change as a result of our work. We outline how we think our activities will lead to certain outputs, and how other activities will ensure that those outputs are employed to lead to changes in behavior (outcomes). In both of these activity sets, the integrated paseo approach is required to ensure that our research activities are creating the right products, i.e. that our products are of use to the people we hope to influence. Change centers around people, and this is the added value of the impact pathway exercise (vis-à-vis a logframe approach). Ultimately, it is people who make the changes, not institutions or policies. The latter are just important operational frameworks. Therefore, our work focuses on people. And within the impact pathway thinking, we differentiate between next-users (users of our products/outputs) and end-users (those who will eventually benefit from the contextualized application of our results).

***Context matters and a paseo approach tries to deal with the great diversity that often unfolds when we unpack 'wicked problems' in a systematic way.*** The wide spectrum of paseo responsibilities and skills are important for achieving program goals (long term impact, strengthening partnerships, location-specific relationships). But this is only possible if the *range* of team members embodies the role of engagement, knowledge management and communications. A regional Paseo staff member can play a critical role within the team by facilitating this type of interaction, being attuned to the political environment, the local landscape, and by retaining the ability to look at both the regional and global scale (meaning they can be the medium through which regional information passes to the global level).

***Adding measurable value and deliverables and keeping abreast of local/regional events.*** It is often difficult to measure aspects that are part of a paseo approach or part of a Paseo's job, such as the strength of partnerships, influence on stakeholders, and level of engagement with policymakers. There are certain aspects that are measurable and can add quantifiable value:

- Profile and visibility of the stakeholders and researchers involved (Indicators: individual organizational performance evaluations);
- Relationship with media (Indicator: # of times projects/activities mentioned in media);
- Policy engagement (Indicator: # of times research/organization is mentioned by a policy maker or in policy documents);
- Stories of change/outcomes (Indicator: # stories, # photographs, field visit stories, etc. shared with corporate communications);

## Part 4: The Elements of a Paseo Approach

In this section we outline our suggested steps for ensuring an integrated paseo approach. They might happen in a different sequence as best fits your specific context. Sometimes intermediary steps are required to get towards the ultimate ideal scenario of embedded and integrated engagement, knowledge sharing and communications.

**Identifying competencies and building skills.** Looking at a team anew. We are moving into a new era of brokerage (complementing extension and facilitation). This is a more complex era, with more challenges. We would like to see the required competencies and skills demonstrated by a wide range of program and project members. Missing competencies should be strategically filled. Relationship building and overcoming the gap between researchers and next-users, such as policy makers or development practitioners, is not the task of one person, i.e. the Paseo (or regional communicator). (See <http://www.whatishumanresource.com/competency-mapping>.)

In the following section we offer some building blocks of key competencies and skill sets that should ideally be embodied by each person involved. However, people come with their strengths (and weaknesses) and we suggest a two-pronged approach: on the one hand we want people to follow Microsoft's motto 'Do what you are best at' and on the other hand we want to incentivize, enable, and allow people to grow and develop skills and competencies, i.e. to challenge and stretch (often beyond their comfort zone). To build awareness and capacity, we have identified a set of skills that the Paseo can train and support others in acquiring:

- Knowing about applied impact pathways and theory of change;
- Listening skills (what is important when listening, interviewing, paraphrasing, etc.);
- Storytelling (what are key elements of a story and what makes a good story);
- Identifying your audience and main game-changers (outcome mapping, social network and stakeholder analysis, boundary partners concept, and reaching people through the most influential nodes within a network - do they exist or need to be built?); and
- Networking and engagement – 1) Creating awareness of the weaknesses and strengths of each team member and of the team as a whole. Using the boundary partners concept that you do not have to have it all but must be aware of relationships and power dynamics, 2) Employing a variety of engagement formats, and 3) Identifying and pursuing good practices.

**Identifying your common goals by building an impact pathway and developing a theory of change - having a unified vision.** Impact pathways must be built right from the beginning of your project or program. It is important to have a plan in place in the form of an impact pathway that clearly lays out where to go with your project activities, what outputs/deliverables are useful for your identified next-users (partners who would be using your products) to make the necessary changes, i.e. behavioral changes or changes in practice that lead to outcomes.

Program and project planning starts with drafting impact pathways, in which teams lay out how their project will result in the necessary positive development changes. So based on this, impact pathways lay out two different types of activities: ones that lead to research products and others that ensure these products are being used and leading to changes. For the latter type of activities, regional integrated engagement, knowledge sharing and communications is essential

for achieving research for development (R4D) goals. In our ideal scenario both set of activities are very much embedded and integral to every program and project team member.

**Aligning your goals with regional strategies and agendas.** Project and programs must recognize ongoing initiatives in a region and clarify organizational mandates and development agendas. One way of doing this could be to involve a wide variety and diversity of people in the building of your impact pathways, not in silos, but with multi-disciplinary researchers and a range of stakeholder representation (diversity in types of people, scales and sectors). This will help build a stronger theory of change based on solid assumptions. Bringing in a diversity of views and perspectives as early as possible (e.g. at the draft proposal stage) will help you build a stronger theory of change and impact pathway. Make sure that the Paseo is involved so that he/she can ensure that the paseo approach is mapped into the impact pathway and that each stakeholder's skills are optimized to achieve maximum impact.

**Linking to corporate communications.** Paseos, often thought of as regionally-focused communicators, will serve a dual role. They will be actively involved in research projects and regionally-focused engagement, but they will also provide an important complementary role to corporate communications. The Paseos, with specialized knowledge of the region and research, will be able to deliver effective materials and information to corporate communications.

Recognition of this dual role for Paseos is important for changing the way in which we view communications, not just as a service for story writing but more importantly as a way in which engagement can be facilitated, partnerships strengthened, and research outputs directed towards the most appropriate actors so that outcomes and impact are not only supported but incorporated into the entire research pathway. (See <http://www.redplough.com/articles/why-marketing-is-the-wrong-metaphor-for-development-communication>.)

**Budgetary provision.** In order for the paseo approach to become deeply embedded in regional programs, strategies and projects, there must be a portion of budget set aside for each project to support the tasks, roles and responsibilities identified in part 2.

**Performance evaluation.** Team members should have their performance evaluated against their involvement in paseo activities, and their contributions to achieving outcomes.

## Main Insights and Recommendations

- **Context matters** - ensure engagement, knowledge sharing, and communications activities are adapted to local conditions.
- **People's personalities matter** and play a key role in the composition of a project or program team. Therefore roles and responsibilities matter and change with each team, as team members come with their different and individual strengths. It is necessary to rethink team integration (communications and science together in an ongoing conversation and joint process of working).
- The interdisciplinarity of teams that with different sectors and on different scales leads often to what we refer to as **blurred boundaries**; responsibilities are often not within one field but cut across or become part of several. It is necessary to accept these rather than wasting resources over-defining clear domains and responsibilities.
- **Making connections** - connecting people, organizations and issues and ideas is an important aspect of the process and also needs **process facilitation**—not just creating a product but also creating some process/dialogue.
- **Grounding work in a theory of change** and embedding engagement and communication activities within it is key, and defining the link to corporate communications is essential.
- A paseo approach requires a **wide range of skills** that include brokerage, knowledge sharing and ability to understand the needs of different audiences and what tools can be used in different contexts.
- **Integration** - projects and regional programs should adopt the paseo integrative approach. Where there is a designated Paseo, project and programs should take a proactive approach to ensuring that they are integrated into the team and project activities. Appropriate tools should also be integrated.
- Understanding the need to engage rather than disseminate is key. "**Engage vs. disseminate**", i.e. use approaches that engage our stakeholders in the process rather than simply providing them with information.
- Value certain assumptions: ambiguity, learning from failure, complexity, multiple knowledge. Design interventions differently: **more engagement, more quick-and-dirty feedback loops**. Teams develop different engagement, dialoguing, communication approaches and products, the usefulness of which needs to be monitored in order to inform research and its impact on development. Recognize the need for **fitted approaches** - know which approach/product to use at the right time, for the right people.

*For more information contact Tonya Schuetz ([t.schuetz@cgiar.org](mailto:t.schuetz@cgiar.org)) or Abby Waldorf ([a.waldorf@cgiar.org](mailto:a.waldorf@cgiar.org)).*

## Annex 1: CPWF Global and Basin Program Case Studies

The key message that comes through in the five cases below is that personality and institutional set up matter and influence impact pathways, strength of partnerships, and the level of engagement with the global program.

### CPWF Global Program Coordinating Perspective

The CPWF communication and knowledge management learning group held a workshop in December 2013 to compile the program's knowledge management and communications lessons learned. The experiences provided CGIAR Research Programs (including Aquatic Agricultural Systems, CCAFS, Humid Tropics, Livestock and Fish, and Forests, Trees and Agroforestry) and R4D programs in general with tools and lessons for how communication and knowledge management can support research to move from outputs to outcomes.

#### Resources

- A presentation on the main learnings derived from the workshop (<http://prezi.com/djccsnzptew8/copy-of-copy-of-the-tree-of-knowledge/>)
- Workshop wiki ([http://kmc4crps.wikispaces.com/CPWF\\_KM\\_Comms](http://kmc4crps.wikispaces.com/CPWF_KM_Comms))

### Basin/Regional Perspectives

#### Limpopo

**Synopsis:** In the Limpopo Basin, communications was approached as something integral to the research for development process. Researchers and partners understood from the beginning (and encouraged from the beginning) that in order to achieve a common set of goals, impacts and change that they would need to engage with each others and stakeholders to whom their projects were directed. This was facilitated through proposal development and constant discussions and engagement about how to achieve the basin's targets.

Engagement was seen as a key principle in attaining the goals set in the Limpopo basin. L5 (WaterNet, GWP, FANRPAN) hosted a forum for researchers to learn how to communicate with policy makers. Throughout the program, key partners hosted annual meetings, which brought together stakeholders, from researchers to program actors, fostering an environment for knowledge sharing, collaboration, and mutual learning. The biggest breakthroughs for the program were at these types of events and meetings, said Amy Sullivan, Limpopo Basin Leader. By the end of the program, during the large science roll out, previously skeptical researchers sold their research and the research for development approach to next users, end users, strategic partners and policy makers.

#### Key factors

- Three regional networks, working together with convening power, legitimacy, relevant mandates, established communication channels: WaterNet, FANRPAN, GWP
- Minimal staff turnover
- L5 and other key partners had good government contacts and regionally legitimacy
- Annual policy dialogues through FANRPAN
- Communications responsibilities vested in partners/networks
- Only one of the five projects in the Limpopo basin was led by a CGIAR center, so built in broad based support well beyond CGIAR



- Only one 'out of basin' lead partner: Stockholm Environment Institute

#### **Things to keep in mind**

- Must know goal and what you are aiming at (decided and understood collectively)
- Be familiar with your audience - prepare receptors as well as the people delivering messages
- Integrate communications in work plans: create a budget line for researchers to spend a specific amount of time on communications; and make it part of IOPs
- Identify clear targets, develop a relationship
- Work within state mandates

#### **Andes**

**Synopsis:** In the Andes Basin, CONDESAN was largely responsible for communications efforts, partly because of their existing work in communications on platforms like InfoAndina. However there were no staff dedicated full time to the program's communications and towards the end of the program, staff turnover rates were high. They faced challenges communicating projects that were not CONDESAN's as some projects questioned why someone else should communicate their work. One of the major successes in communications in the basin surrounded the broad consensus among project partners on the evolution of the benefit sharing mechanisms (BSM) terminology, which has been adopted by stakeholders and policy makers who were involved in the project from the beginning.

#### **Things to keep in mind**

- Need clear research plan and goals
- Create relationships with policy makers
- Communications person must be embedded in the project and must serve dual role as link to policy environment

#### **Ganges**

**Synopsis:** In the Ganges Basin, there was a high turnover rate of communications staff for the last 4 years of the program. Leadership within the basin did not emphasize communications functions to researchers and stakeholders, thus taking a different approach to research for development. The basin had a good set of partners but engagement was lacking.

#### **Things to keep in mind**

- Create clear understanding of how research is linked together
- Emphasize engagement and project coordination

#### **Mekong**

**Synopsis:** In the Mekong basin, all project leaders were seen as agents of communication with a clear research for development goal. Researchers were mandated to set aside budget and time to communicate and were evaluated against their communications efforts. An assimilation approach was used where an idea or "seed" was planted in a target person's mind with an objective of having that person come back for more information. Focus was given on presenting messages in ways that stakeholders would absorb them. Basin leaders determined that policy makers learn through conversations and geared their communications strategy to foster discussion and conversation spaces, organizing workshops and conferences centered on

dialogue. Monitoring progress and success of these efforts is a challenge and an area that needs to be better developed.

***Things to keep in mind***

- Comms should be flexible and respond to opportunity
- Define clear targets and make sure to speak their language
- Include communications (with budget) in projects
- Evaluate researchers based on engagement with partners – this makes partners feel empowered
- Create trust