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Michael P. Johnson
Gerald Midgley
George Chichirau

Centre for Systems Studies

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Michael P. Johnson
Department of Public Policy and Public Affairs,
University of Massachusetts Boston, USA
michael.johnson@umb.edu

Gerald Midgley
Centre for Systems Studies
Business School, University of Hull
Hull, HU6 7RX, UK
+44 (0)1482 463316
g.r.midgley@hull.ac.uk

George Chichirau
Department of Public Policy and Public Affairs,
University of Massachusetts Boston, USA
George.Chichirau001@umb.edu

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Emerging Trends and New Frontiers in Community Operational Research

M.P. Johnson[1], G. Midgley[2,3,4,5,6] and G. Chichirau[1]

[1]Department of Public Policy and Public Affairs, University of Massachusetts Boston, US
[2]Centre for Systems Studies, Business School, University of Hull, Hull, UK
[3]School of Innovation, Design and Engineering, Mälardalen University, Eskilstuna, Sweden
[4]Victoria Management School, Victoria University of Wellington, Wellington, New Zealand
[5]School of Agriculture and Food Sciences, University of Queensland, Brisbane, Australia
[6]School of Social and Political Sciences, University of Canterbury, Christchurch, New Zealand

Abstract

Community operational research (COR), and its disciplinary relation, community-based operations research, have an increasingly high profile within multiple domains that benefit from empirical and analytic approaches to problem solving. Many of these areas are concentrated in human services, community and economic development, education and other non-profit services, and the nature of inquiry tends to be motivated by action research and systems thinking as much as traditional decision modeling. However, there are many other areas of inquiry in which COR has had only a modest presence to date. This paper identifies a number of these, distinguishing between 'emerging trends' (mostly in well-studied areas of operations research, management science and analytics) and 'new frontiers', which can be found in disciplinary traditions not commonly oriented towards empirical and analytic methods for problem solving, where community-engaged decision modeling represents new ways of generating knowledge, policies and prescriptions. This paper will show how the exploration of emerging trends and new frontiers in COR can provide a basis for the development of innovative research agendas that can broaden the scope and impact of the decision sciences.

Keywords: Community operational research, community-based operations research, analytics, developing countries, systems thinking.

1. Introduction

Community operational research (COR), and its disciplinary relation, community-based operations research (CBOR), has an increasingly high profile within multiple domains that benefit from empirical and analytic approaches to problem solving. Many of these areas, as represented by papers in this special issue, are concentrated in human services, community and economic development, education and other non-profit services, and the nature of inquiry tends to be motivated by action research and systems thinking as much as traditional decision modeling. However, there are many other areas of inquiry in which COR has had only a modest presence to date.

The goal of this paper is to explain how community operational research can help identify problem opportunities, novel analytic methods, theory-building and contributions to practice in a variety of domains, some closely identified with operations research, management science and analytics (henceforth referred to generally as the 'decision sciences'), and others more firmly rooted in disciplinary traditions not conventionally associated with decision science. By doing so, we hope to provide encouragement and resources for researchers and practitioners who seek new applications for COR that support frequently-pursued COR values, such as community engagement, equity and social justice.

We start by providing a short introduction to Community OR, and in so doing we clarify distinctions between COR and other areas of decision science. Elsewhere (Midgley et al, 2017a), we argue that the definitive feature of COR is "the meaningful engagement of communities" in OR applications, which leaves open questions about what counts as 'meaningful' (see Ufua et al, 2016, 2017, for a discussion of this) and what constitutes a 'community' (e.g., Midgley and Ochoa-Arias, 1999). Importantly, defining COR in this way draws out a principle of practice (meaningful community engagement) that is present in all previously published examples of COR, so this is not an imposition on our discipline. However, it also proposes a normative standard for future practice and publications, to limit the possibility of 'drift' into less engaged forms of OR. Note that a consequence of this definition is that there are overlaps between COR and other well established traditions, such as public sector OR and even OR in the private sector (see Midgley et al, 2017a, for examples). For instance, perfectly good public sector OR can be client engaged, but not community engaged. However, when the community is actually given meaningful input, the project may be both public sector *and* Community OR. Below, we use public sector OR as an example to compare COR with, although we should provide a caveat here: many of the things we discuss below are *general characteristics* of COR compared with public sector OR, and the term

'general characteristics' refers to things that are *commonly found* in applications. This is different from saying they are *defining features* of COR; in our view, only the 'meaningful engagement of communities' in OR applications can be considered definitional.

Public sector OR has traditionally addressed three areas of decision modeling impacts: efficiency, effectiveness and equity (Savas 1969, 1978). Bardach and Patashnik (2016) express efficiency as maximizing the sum of individual utilities and Stokey and Zeckhauser (1978) characterize efficient solutions as lying on a Pareto frontier of possible allocations of goods and services among members of a population. Effectiveness, in contrast to efficiency, seeks to identify policies or interventions that best achieve socially desirable outcomes, especially when markets diverge greatly from the common neoclassical assumptions of perfectly competitive markets – or when there are no easily identifiable markets for the goods or services of interest (LeClerc et al 2012). Finally, notions of equity, fairness or justice address concerns that a just society may take steps to ensure that certain groups receive benefits from policies or interventions roughly commensurate to their needs (LeClerc et al 2012). Commonly used introductions to management science, such as Winston and Albright (2016), tend not to address efficiency directly, rather concentrating on objectives most salient to private sector operations such as minimizing cost, or maximizing yield or profit. Mainstream introductions to management science are equally silent on issues related to effectiveness and equity. Even standard reviews of public sector OR (see e.g. Pollock et al 1994) have relatively little say about issues of equity and social justice as compared with more traditional emphases on technical modeling.

COR is different from client-but-not-community engaged public sector operations research in a number of ways. First, COR places great emphasis on *intervention*, or "purposeful action by an agent to create change" (Midgley 2000, p.9), as opposed to observational science alone or methodological innovations outside the context of interventions. Effective COR interventions require a deep understanding of the problem context, a commitment to empiricism, engagements with stakeholders and primary data collection to reflect the lived experiences of those who are engaged with the problem to be solved (e.g. Friend 2004). Many public sector projects also involve intervention, but the majority of the publications discussing them are framed in terms of novel modeling techniques and the findings from data analyses, with the engagement of clients and stakeholders that is required for effective intervention taking a back seat. Publications about COR projects, in contrast, tend to emphasize the latter alongside the reporting of methodological innovations (e.g. Ritchie et al 1992; Midgley and Ochoa-Arias 2004a; Johnson 2012a).

Next, in line with the focus on intervention, COR generally has a central concern for *local engagement and impact*. This arises from a belief that many problems of greatest immediate concern to citizens (such as education, crime, housing and economic development) have a local character, and that giving local residents a say in problem identification, formulation, solution and the implementation of new prescriptions or guidelines may result in rapid improvements in quality of life (as evaluated by those local residents).

COR also usually has a concern for *disadvantaged, underrepresented and underserved populations*. This is about social justice, which involves efforts to promote "….a just society by challenging injustice and valuing diversity" (National Federation for Catholic Youth Ministry 2008) or ensuring "equal access to liberties, rights, and opportunities, as well as taking care of the least advantaged members of society" (Appalachian State University 2016; see also Robinson 2016). Social justice was a central concern of many of those who first founded COR (Rosenhead, 1986; Jackson, 1987).

Community OR focuses on *problem solving processes as well as outcomes* (Midgley and Ochoa-Arias 2004b); in particular, designing interventions that are intended to improve the understanding of decision opportunities, data and solutions as much as producing specific prescriptions or strategies (e.g. Ritchie 2004). Johnson (2012b) argues that community-based operations research, a domain closely aligned with COR, derives a great deal of value from identifying problems which may not, at first glance, appear amenable to conventional OR methods; formulating those problems in such a way as to prioritize diverse conceptions of values, evidence of beneficial social impacts and equity; solving them (or addressing/managing them when no immediate resolution is possible) through multiple research frameworks and analytic methods that yield understanding as much as prescriptions; and implementing solutions to enable capacity building and social change, with theory development being a possible outcome too.

Community OR embodies a *critical approach and a concern for ethics*. By 'critical approach', we mean a desire to interrogate assumptions about whose conceptions of a problem count (e.g., Foote et al 2007); to explore the implications of power relationships between 'experts' who address problems, 'clients' who present problems to be solved, and communities who are the potential beneficiaries or victims of new policies or prescriptions (e.g., Midgley and Milne 1995); and take seriously alternative epistemologies, research methodologies or worldviews, such as postpositivism, constructivism, transformative research or pragmatism (Taket and White 1993; Creswell 2014). 'Ethics' refers to concerns about the probity of engagements by researchers (e.g. issues of independence and honesty when there is a fee paying client and other stakeholders

may suffer); the integrity of relationships between researchers, clients and participants, so exploitation of various kinds is avoided; and the consequences of decisions on those affected but not involved (Wenstop and Koppang 2009). Moral inquiry can shed light on the possible rights and responsibilities of stakeholders, especially in problematic situations (Mingers 2011a). Midgley et al (1998) argue that every boundary judgment made in a COR project (about whose views and what issues to include, exclude or marginalize) is also an ethical judgment, so ethics has to be a central concern for practice.

In contrast with many other application domains for operations research, management science and analytics, COR practitioners tend to exhibit a methodological preference for *qualitative* (e.g. Rosenhead and Mingers, 2001) and *mixed method* (e.g. Mingers and Gill, 1997) approaches to problem solving, as opposed to the traditional foci on quantitative data, mathematical modeling and the manipulation of quantitative data via algorithms. The tension between those advocating for qualitative versus quantitative methods is long-standing within OR/MS (Kirby 2007; Mingers 2011b,c) and, to some extent at least, mixed method approaches are able to transcend this by accepting the validity and utility of both (e.g. Flood and Jackson 1991; Flood and Romm 1996; Mingers and Gill 1997; Midgley 1992, 1996, 2000; Midgley et al 2017b).

Finally, COR practitioners generally seek to design interventions that result in *community empowerment and social change*. They mostly eschew the idea that problem-orientated inquiry can be 'neutral' or 'value-free' (e.g. Midgley, 2000). This empowerment and social change orientation was partly introduced as a reaction to the right wing politics of the Thatcher era in the UK (e.g. Rosenhead 1996), but has since expanded into a broader philosophy of 'engaged OR' (Midgley et al, 2017a) that provides a counterweight to both unfettered capitalism and centralized bureaucratic planning (Jackson 1987). As such, it represents a re-imagining of what operations research can do with and for communities in general (Midgley et al 2017a), and disadvantaged and marginalized communities in particular, often using methods not considered within the mainstream of OR in the USA (compare Simchi-Levi's, 2006 and 2009, defense of narrow boundaries for OR with Ackermann et al's, 2009, appeal to take soft OR, and by extension Community OR, seriously within the discipline).

Community operational research thus has many features that position it well to productively address a wide range of problems of social concern, including those traditionally considered to be the province of the social sciences, human services and information technology disciplines, as distinct from the decision sciences. We explore the relationship between COR and these domains in the remainder of this paper, which is organized as follows. Section 2 discusses challenges and

opportunities for COR in research and practice. Section 3 presents emerging trends, primarily in the decision sciences and related fields, where OR is well positioned to have a substantial impact in the shorter term, and where COR might make a useful contribution. Section 4 discusses new frontiers, primarily areas distinct from the decision sciences, where there are longer-term prospects for COR's impact in practice and scholarship. Section 5 concludes with elements of a research agenda built upon the previous reflections.

2. Challenges and Opportunities

Community operational research faces a number of barriers to widespread acceptance in teaching and research in decision science, and impact in practice commensurate with its social justice motivations. First, ordinary citizens may lack the expertise needed for data-driven problem solving, and therefore require considerable support (Ritchie 2004). This is arguably why there is more of an emphasis in COR on the participative use of qualitative methods. Also, COR often requires organized and sustained participation among multiple stakeholders for problem identification, formulation and solution (Gregory and Midgley 2000; Taket and White 2000), which may run counter to a tendency to rely on government and nonprofit organizations to take the lead. Updating and managing socio-technical systems is difficult and is more commonly performed by trained practitioners working in established organizations. Knowledge generated by COR studies does not necessarily lead to the production of expert prescriptions in the sense traditionally understood within operations research, industrial engineering and related fields; rather, the practitioner may facilitate a process of learning that flows seamlessly into decision making without any need for expert recommendations (Bryant et al 1994). Of course, most studies in the decision sciences with an application focus aspire to implementation as an end goal. However, special interests inside and outside the community may divert energy and enthusiasm towards aims not always shared by local actors. Stakeholder participation can be an antidote to this (Rosenhead and Mingers, 2001), but there also has to be a recognition that, in some contexts, there are stakeholders who try to get their way through manipulation or coercion rather than through engagement in free and fair dialogue (Jackson 1991, 2006; Midgley 1997), so this can make the design of COR projects and pathways to implementation quite complex. Finally, there are barriers connected with online engagement: while this is now relatively common in the current era of social media, especially with spatially dispersed communities, it is not easy to translate the energy created online into in-person activism, especially if it requires sustained local action.

However, despite the above challenges, COR and CBOR may also benefit from a number of opportunities to transform the decision sciences. Operations research for the public good,

especially to benefit resource-constrained and mission-driven nonprofit organizations, has received substantial visibility through a student paper contest sponsored by the Institute for Operations Research and the Management Sciences called 'Doing Good with Good OR' (INFORMS 2016a) as well as volunteer-driven initiatives of professional societies in the US ('Pro Bono Analytics', INFORMS 2016b) and the UK ('Pro Bono OR', ORS 2016). Scholars such as Suzanne Mettler (2011) have demonstrated the importance of the 'submerged state' in diverting public benefits to most-privileged populations, providing a basis for COR researchers and practitioners to design interventions to reconcile technocratic/managerial understanding with people's real-world concerns. Current research in e-government and e-governance (Manoharan 2016; Chen and Ahn, 2017) demonstrates the potential for internet-enabled applications to provide high quality and rapid response services that can increase the level of trust between citizens, nonprofits and government, improving the likelihood that COR initiatives can be successful. However, these promising trends require an increased awareness by citizens of root causes of social concerns and the potential of localized direct action to address them, but recent elections in the US and the EU referendum in the UK may cast doubt on the willingness of many citizens to examine systemic barriers to an improved quality of life. In the face of this, we suggest that the primary opportunity for COR to increase its breadth and impact are specific application areas for which COR may provide novel and high impact insights, strategies and operational recommendations. We describe these in the two sections that follow.

3. Emerging Trends

Over the past 15 to 20 years, new areas within operations research have emerged to respond to contemporary issues in the public and private sectors that go beyond the traditional core foci of OR. As these new domains have become more closely associated with the mainstream of OR, there are increasing opportunities for Community OR to address them by adapting models, analytic methods and methodologies to strengthen a focus on community engagement and social change. COR practitioners can therefore make worthwhile contributions in the new areas while simultaneously moving our specialism more into the mainstream of OR. The two most interesting new areas (to us) where COR can contribute something new are humanitarian logistics and analytics. These are discussed below.

3.1 Humanitarian logistics

Humanitarian logistics represents an adaptation of principles of transportation, facility location, supply chain analysis and other subdisciplines to the problems of planning for and responding to natural and man-made crises (Çelik et al 2014). Inasmuch as disasters have effects that can vary

across neighborhoods, and neighborhood-level preparation and response can mitigate the effects of disasters, there would seem to be many potential applications of COR in this area. However, a lot of humanitarian logistics applications are conceived at the systems level and rely on mathematical modeling and solution algorithms associated with traditional operations research (Duran et al 2012, Ekici et al 2014; Liberatore et al 2014). One humanitarian logistics application, however, emphasizes appropriate information technology to support 'last mile' distribution of goods in communities with compromised infrastructures, developed in conjunction with local stakeholders (Ergun et al 2014). While there has been a COR project on disaster planning (Gregory and Midgley 2000), this predates the bulk of research in humanitarian logistics and does not speak to its focus on solving technical problems regarding the optimal positioning of goods and services pre- and post-disaster. COR can enable researchers and practitioners to integrate stakeholders' experiences and preferences directly into an enhanced model development process that highlights difficulties in on-the-ground disaster-related logistics: fear, uncertainty, corruption, political oppression and so on (Munday 2015).

3.2 Analytics

The discipline known as analytics comprises three distinct tasks: descriptive analytics, or the study of systems, organizations and phenomena according to historical data; predictive analytics, or the informed estimation of future values of variables or configurations of systems to aid in the anticipation of as yet unknown events; and prescriptive analytics, or the design of policies, guidelines or practices based on optimal or best possible values of decision variables assumed to be under the control of the modeler (Liberatore and Luo 2010). Motivated by the explosion of data from processes and devices, the business process redesign movement and the widespread availability of sophisticated software, analytics has in many ways become the public face of the professions known heretofore as 'operations research' and 'management science'. Of course the relabeling of disciplines and research communities is always contentious because professional identities are at stake, and there is clearly an ambiguous relationship between OR and analytics (Mortenson et al 2014). Popular treatments of analytics are numerous, including Nussbaumer Knaflic (2015) and Siegel (2016). The Institute for Operations Research and the Management Sciences, for example, has developed an analytics credentialing program for practitioners (INFORMS 2016c) and a new analytics maturity model to guide professions through the process of organization redesign through analytics (INFORMS 2016d).

Though analytics is most often conceived as a quantitative domain, recent work has emphasized the role that problem structuring methods and other qualitative methods may play in it (Ranyard

et al 2015). This hints that COR may benefit from emphasizing its relationship with analytics, interpreted broadly as ways to solve practical problems using diverse methods, some of which involve quantitative data. COR may make contributions to analytics by emphasizing questions of what data can and should do for individuals, communities and organizations; whether concepts such as effectiveness, social impact, institutional challenges and the like are, or can be, taken seriously by decision makers seeking to quantify various aspects of an analysis; and, most importantly for COR, how community residents themselves (and their representatives) can work with organizations to define, collect and analyze data that are relevant to their own lives (see the subsection on 'big and difficult data' below). Some of these questions have been addressed in the context of volunteer consulting engagements sponsored by Pro Bono Analytics (INFORMS 2016b) and Pro Bono OR (ORS 2016).

4. New Frontiers

In contrast to the two domains described above, there are a number of other research areas which have had identities substantially or largely distinct from OR, but which have characteristics that are supportive of innovations within COR (and CBOR). Community OR draws its power from the insights it may provide on contemporary policies, application contexts and technologies that have an impact on spatially distinct and constrained groups of people and infrastructures. Here we want to discuss how COR may be applied to a number of new frontiers, and what the discipline may learn from these new applications. Clearly, there are many more examples than can be covered by a single paper, but we have selected nine that seem to us to be particularly promising, either because work is already going on to inform them with COR (e.g., community-based intervention in developing countries), or because people already in those areas share common values with COR practitioners (e.g., working in the service of indigenous people on issues of concern in their communities).

4.1 Urban planning and community development

Urban planning, community development, urban affairs and related fields are focused on developing strategies to make homes, neighborhoods and cities better places to live for as many people as possible. This can be done by permitting, encouraging or forbidding certain types of physical infrastructure (urban planning); helping local residents advocate for their needs; developing local services and institutions (community development); and providing guidance and insight regarding all manner of products and services intended to meet the needs of urbanized communities (urban affairs) (see e.g. Hall and Tewdwr-Jones 2010; Levy 2017). Since these fields

have the improvement of life through peoples' daily activities as a core concern, there would seem to be a role for Community OR. Indeed, Johnson and colleagues have adapted principles of COR to address community-level responses to the housing foreclosure crisis, both at the high level of project design (collaborating with community partners to identify and set research agendas; see Turcotte et al 2015) and at the low level of executing particular research designs. In terms of the latter, examples are identifying local values associated with community revitalization and foreclosure response (Keisler et al 2014) and developing a novel metric for community development that links strategy and impact (Johnson et al 2012). Johnson et al (2015) have also employed some principles of COR to design and evaluate decision models for non-traditional local development to counter blight, vacancy and abandoned properties.

However, despite a wide range of potential application areas within the service sector, including transportation and warehousing, information and communication, human health and social assistance, financial and insurance services, and many more, documented applications of non-community OR in the service sector appear to be overwhelmingly concentrated on traditional quantitative, mathematical model-driven approaches (Xing et al 2013). COR principles are actually quite prominent in contemporary treatments of community development (see e.g. Defilippis and Saegert 2012) and new initiatives to build collaborations between researchers and practitioners for community development and social change exist (URBAN 2016), though they are not named as COR in teaching and research contexts. COR may benefit greatly by emphasizing connections with urban/city planning and community development, and connecting well-understood methods for community engagement and design with decision science principles of problem identification, formulation and solution that have an emphasis on process learning and stakeholder impact rather than mostly on technical issues of mathematical modeling and algorithm design.

4.2 Information systems and information technology (IS/IT)

IS/IT is a well-studied domain, both in stand-alone academic disciplines and university departments and colleges, and as an active area of inquiry within the decision sciences (see e.g. *Information Systems Research*, http://pubsonline.informs.org/journal/isre). However, there has been relatively little attention paid by these disciplines to the design of community-engaged methods for problem solving in the OR tradition, and conversely relatively little attention has been paid within COR to IS/IT as either vehicles for solution implementation or domains within which intensive community engagement might be performed. There are, of course, exceptions: for

instance, Córdoba and Midgley (2006) show how IS planning can put stakeholders front and center through an alternative approach based on critical systems thinking (also see Córdoba and Midgley, 2003, 2008), and Barros-Castro et al (2015) apply a similar approach to the engagement of school children and teachers in the design of computer-supported collaborative learning programs. With this in mind, perhaps one of the most fruitful areas of potential interchange between COR and IS/IT researchers is in relation to citizen engagement. For both fields, acquiring knowledge on the ultimate 'end users' and ensuring their empowerment are central concerns (e.g. Córdoba-Pachón, 2010).

Another illustrative example could be Barrett et al (2016), who look at how value is created in online communities over time. They argue that researchers need to move away from considering online participants as largely homogenous, and towards identifying stakeholder groups and key participants. They do precisely that in a case study of an online healthcare community group, and such work showcases the potential of IS research for community engagement. Lopez (2015) does something related but different while looking at the online behaviors of urban communities targeted by participatory information systems programs. She finds that the geographic targeting scope matters a great deal (local versus hyper-local); but also that off-site communication is essential to IS development, and that the greatest challenge to online community sustainability is residential instability. To avoid problems of marginalization, designers of participatory information systems must engage transient populations as well as those remaining for long periods of time. In any case, research indicates that information systems seeking to engage small, urban communities need to be designed differently from sites with a global reach. Raymaker (2015) is an example of a practitioner who explores the latest IS research on direct engagement using critical systems thinking and community based participatory research. Her study is an exploration of the development process of a healthcare-focused web site for autistic end users, but the implications for further research are immediately obvious: what would be different if the engagement was directed at other populations or organizational contexts?

Thus, COR could transform IS/IT by emphasizing community-engaged methods for systems design and implementation, drawing connections between technical innovations and conventional notions of usability, and the expressed needs of especially disadvantaged end-users whose low income, lack of social status and influence may make them more often seen as consumers of IS/IT innovations rather than sources of such.

4.3 Big and difficult data

The past decade or so has seen an explosion of research in the area of ‘big data’, commonly understood to be the collection of very large datasets routinely generated through information systems such as point-of-sale systems, social media, public surveillance and the ‘internet of things’ (Bollier 2010). Big data can be seen as an aspect of analytics, but the focus here is more on the sources of the data, and the special problems associated with handling huge repositories of data, constantly refreshed from diverse sources in real time. While datasets and analyses of big data are usually dominated by experts working at a distance from local communities, there is growing evidence of community participation in large scale data analysis, through crowdsourcing and community activism (Calvard 2016). Moreover, researchers are increasingly exploring issues related to community-level participation and curation of large datasets of public and local interest (Bertot et al 2014) and community collaborations to extract alternative meanings from large datasets (Couldry and Powell 2014).

Another approach to data analytics and community engagement arises from the notion that in many cases the data that are most relevant to community needs, especially disadvantaged and lower-income communities, are not ‘big’ at all, but challenging because of a lack of consensus on what data elements should be collected, from what sources and put towards what ends (which explains why this section has a title distinct from simply ‘big data’). Also, even modestly-sized datasets can tax the capacity of mission-driven nonprofit organizations (Boland 2012; Johnson 2015). The research on this conveys in aggregate a substantial opportunity for COR to fully engage in research on data science and analytics, using our discipline’s unique perspective on local agency and a critical approach to identify novel applications for data collection, analysis and use for local development. One contemporary application of community data analytics, for example, is the issue of defining specific metrics for local economic development impact to be collected by local organizations that may be distinct from those mandated by local government (Johnson and Jani 2016).

4.4 Smart cities

Connecting with big data is the movement to harness large datasets to improve operations and management of government and services within neighborhoods and cities through advanced technologies. A ‘smart city’ is defined as “a synthesis of hard infrastructure (or physical capital) with the availability and quality of knowledge communication and social infrastructure. The latter form of capital is decisive for urban competitiveness" (Caragliu et al, 2009, as summarized in Wikipedia and presented in Batty et al 2012). While most smart city applications, such as the real-

time analysis of mass transit data for better prediction of ridership and congestion (see e.g. Batty 2013), appear to be conventional applications of centralized, expert-driven analyses, Batty et al (2012) acknowledge the potential for democratic participation via 'citizen science' regarding the nature, content and use of large datasets for urban operations and management (see Gregory and Atkins, 2017, for some reflections on the potential for connecting COR with citizen science).

Since smart cities have the potential to affect the lives of their residents at all times and in all places, there appear to be significant opportunities for Community OR to enable diverse stakeholders to influence the ways in which smart cities are designed and implemented, and to apply stakeholder engagement to define the real-life problems they purport to solve. In particular, COR can challenge common notions of technology as a mostly unalloyed good, emphasizing the role that smart city-focused technologies can play in expanding the reach of the surveillance state and highlighting class and social disparities in access to and use of smart city technologies and data (see e.g. White and Trump 2016). IBM is a company that has invested significantly in the area of smart cities (e.g. Dirks and Keeling, 2009), and one of the authors (Gerald Midgley) has been engaging with them for over 10 years on the sticking points for implementation, which often concern the governance of initiatives and not the technology. Here, the emphasis of COR on community and stakeholder engagement could make a significant difference to both the design of these initiatives to meet community concerns, and their eventual implementation, especially as much of the literature on both COR and smart cities has been influenced by systems thinking, so there is already enough of a common language to make a start.

4.5 Resilient cities

The notion of resilient cities addresses a myriad of contemporary challenges such as economic development, social polarization and segregation as well as climate change and ecological degradation through the notion of planning, adaptation and response to immediate and long-term threats to human and community health (Spans and Waterhout 2016). Resilient cities are well-positioned to direct intervention in physical and social infrastructure in urbanized areas to redress inequalities and structural flaws. The importance of resilient cities is represented by the worldwide '100 Resilient Cities Program' sponsored by the Rockefeller Foundation. Research programs in resilient cities abound, including Boston in the USA (Martin 2015); Rotterdam in the Netherlands (Spans and Waterhout 2016); Dhaka in Bangladesh and Brisbane in Australia (Walters 2015). These studies take as given the importance of community engagement and participation in risk assessment and planning for, and adaptation to, long-term changes in climate and economy that could reduce the quality of life, as well as displace and put at risk the lives of millions of people.

They directly engage the notions of stress and trauma, not just as the result of discrete disasters but as indicators of reduced wellbeing in response to chronic mal-adaptations of urban areas to global change, experienced locally. There appears to be a significant opportunity for COR to articulate community values, structure objectives and develop interventions in close cooperation with affected communities (Helfgott, 2017), especially those at greatest risk of harm due to low income, lack of political influence, low levels of social engagement, etc.

4.6 Developing countries

Countries in the 'global south' face a much different set of political, social and economic challenges than the developed countries in which OR was started (Rosenhead 1993). From the increased severity of climate-change-related extreme weather events, to high levels of internal and external human displacement due to war, political instability and food insecurity, to daily life challenges arising from poverty, disease and a lack of good governance, developing country issues might seem initially to be too large and systemic to be addressed in a substantive way by Community OR, as opposed to well-established disciplines such as international development, human security and global governance. However, there has been consistent progress towards the creation of OR infrastructures in education and research in developing countries, as exemplified by Caulkins et al (2008) and Maposa et al (2016). Caulkins et al provide specific examples of OR teaching that can be easily adapted to resource-constrained environments, and which are responsive to decision problems arising from the African experience. Maposa et al (2016) present a more traditional quantitative modeling-based approach to extreme weather event forecasting and response. The literature on specifically COR-based engagements in developing countries includes work by Ochoa-Arias (1994, 2004) in Venezuela, Sova et al (2015) in Nepal, and Tirivanhu et al (2016) in Zimbabwe. There is also a more general review of OR applications in development (White et al 2011); a set of ideas for adapting COR to the needs of developing countries (Rosenhead 1993); and a proposal for a new conception of public health in development based on COR principles and practice (Thurnhurst 2013). These works emphasize the roles that community engagement, qualitative methods, problem structuring and values-explicit inquiry may play in a developing country setting. Recent papers, still under review, addressing COR in developing countries (e.g. Espinosa and Duque, 2017; Helfgott, 2017; Romm, 2017; Ufua et al, 2016, 2017) may advance the state of research and practice in this area even further.

4.7 Diversity and inclusion

Diversity can be broadly understood as encompassing individual measures that are often viewed or treated as markers of difference, as well as internal individual measures that may reflect

personal understandings of the world, often referred to as cognitive diversity. Diversity always exists in social systems. Inclusion, on the other hand, often needs to be consciously enabled. In order to leverage diversity, an environment must be created where people feel safe, supported, listened to, valued and able to do their personal best. This is often a 'wicked' problem in the sense that inclusion initiatives tend to have numerous stakeholders, a close connectedness with other problems, and trade-offs between values are difficult to state (or when stated, may be difficult for some stakeholders to accept). There are definitely many diversity and inclusion problems amenable to solution using traditional OR: e.g. public school assignment (Shi, 2015); college admissions (Chen and Kesten 2016); and job interview process design (Johnson, Heckman and Chan 2016). However, the more 'wicked' problems may not be accommodated by traditional approaches, and here we refer to the more comprehensive attempts at solving failures of inclusion: gender diversity quotas, job guarantee programs and universal basic income design, for instance. It is difficult to imagine any of these being tackled competently without meaningful community engagement and without a critical awareness of the strengths and weaknesses of different approaches. Examples of the application of COR to this domain are presented by Pindar (1994), who focuses on racial harassment; Cohen and Midgley (1994) and Midgley and Milne (1995), who look at the marginalization and inclusion of people with mental health problems; Gregory et al (1994) and Gregory and Romm (2001), who discuss the empowerment of blind and partially sighted health service users; and Boyd et al (2004), who explain the design of a COR process that put the perspectives of homeless children at the heart of the development of services to meet their needs. This is an area that has been of significant concern in COR already (for a wider set of readings, see various chapters in Ritchie et al, 1994; Midgley and Ochoa-Arias, 2004b; and Johnson, 2012a), but there is still the potential to do more, and especially to build practice-relevant theory of inclusion as a generic issue (e.g. as discussed by Midgley, 2000).

COR has the potential to build interventions around critical perspectives on diversity and inclusion, taking account of issues such as the power relationships that characterize the institution or phenomenon of interest, conflicts between stakeholders with different perspectives, whether the current organizational structure or mission should be preserved or replaced in the interests of social justice, how community engagement should be defined, and whether there are roles for systems thinking and problem structuring methods in developing novel solutions to issues of diversity and inclusion (Johnson 2016). The recent unveiling of a comprehensive and radical policy platform for the US-based Black Lives Matter movement (The Movement for Black Lives 2016) provides a promising opportunity for COR to engage with local activists to develop interventions that support efforts for social change. One aspect of COR that could be particularly

useful in this area is the theory of boundaries and marginalization processes that has informed a number of COR interventions (e.g., Midgley et al, 1998, 2007; Midgley, 2000, 2015; Midgley and Córdoba, 2006; Boyd et al, 2004, 2007; Foote et al, 2007; Shen and Midgley, 2007, 2015; Midgley and Pinzón, 2013; Barros-Castro et al, 2015).

4.8 Environmental issues

Traditionally concerned with stewardship and sustainability, environmental policy and action has broadened its focus to address systemic issues related to climate change, urban resilience and human adaptation. Central to all of these application areas is the role of community and stakeholder participation in both agenda setting and individual/collective action. Ulrich (1993) discusses the need for systems thinkers to engage the ecological movement without false pretensions that systems/OR can provide comprehensive analyses; rather, we should be aware of our boundary judgments and the values that inform them. Also see Midgley (1994) for a discussion of the frequent marginalization of environmental issues due to overly narrow boundaries defining economic and social concerns. Midgley and Reynolds (2001, 2004a,b) present an agenda for change in OR to meet the needs of environmental management, which includes a greater focus on stakeholder and community engagement. Walter-Toews et al (2004) offer a new COR methodology to integrate community engagement with scientific analysis in projects where both environmental and social values need to be accounted for in development proposals.

More recent OR on environmental issues includes the work of Becker et al (2014), focusing on stakeholder engagement and quantitative analysis for pre-disaster planning; Schafer and Gallemore (2016) on the use of multi-criteria decision analysis for agenda setting in natural resources project funding; Pimentel et al (2016) addressing modeling principles for decision support system development, focusing on environmentally friendly mining; and adaptations of principles of problem structuring methods and value-focused thinking for Life Cycle Sustainability Assessment in waste management systems (Souza et al 2014). In this body of research, however, the role of community members, as opposed to planners and managers, does not appear to be prominent, so there is an opportunity here for Community OR practitioners to highlight the benefits of community-based intervention design, implementation and evaluation.

4.9 Indigenous people's issues

While much of the literature on Community OR originates from the UK, as the movement spreads into other countries with different cultural histories, COR theory and practice will come into contact

with indigenous people. Indeed, there is already a small but growing literature on OR practitioners working with indigenous communities (Ahuriri-Driscoll et al, 2005; Midgley et al, 2007; Beall and Brocklesby, 2017; Morgan and Fa'aui, 2017). The term 'indigenous' refers to the 'first people' in any given country, who were there before colonizing forces arrived (Smith, 1999). There are various people around the world who are trying to preserve their native cultures despite sometimes overwhelming pressure to give up their ancestral lands, languages and identities – and there are others (such as Māori in New Zealand) who have survived this cultural imperialism and are now resurgent; developing their languages and identities in new directions while still firmly anchored in their cultural history and traditions.

Working with indigenous people raises issues that are not encountered in any other setting. For a start, Western science, including the language and methodologies of OR, can be viewed as an instrument of domination because, historically, indigenous people have been subject to the 'objective' gaze of researchers who viewed their cultures as alien curiosities or ridden with primitive superstitions (Smith, 1999). This attitude has left deep suspicions amongst indigenous communities that scientists and operational researchers are at best going to take from them (in the form of publications and reputation) without giving anything in return, and at worst are going to assume that they have a superior rationality that validates the imposition of their own problem definitions and solutions without proper community engagement. These suspicions are amplified when the OR practitioners are employed by institutions that were originally founded by colonists (such as government departments), and non-indigenous COR practitioners therefore have to be strongly aware of identity issues and build relationships with communities over time and with cultural sensitivity (Midgley et al, 2007). Indeed, in recent years there have been movements in some indigenous communities to create their own methodologies, grounded in their own cultures. A good example is *Kaupapa Māori* in New Zealand (Bishop, 1996; Smith, 1999), which involves research by Māori, for Māori. Non-Māori OR practitioners can be involved, as long as the leadership sits with Māori themselves. This poses a significant challenge to OR practitioners, who need to negotiate everything, including whether they will be allowed to publish under the banner of Community OR!

There can also be cultural conflicts: while many indigenous methodologies are highly participative, there may be elements of local village culture that limit participation in ways that non-indigenous researchers feel deeply uncomfortable about. A good example in New Zealand is that a minority of Māori villages hold communal meetings where only men participate in the 'inner circle' and women have to sit silently around the edge – their marginalization physically expressed in the

seating arrangements. There are arguments in New Zealand about whether this tradition is an original Māori one or whether it was imposed by Christian missionaries, but whichever is the case, encountering this situation can place equality-minded Community OR practitioners in an ethical dilemma: whether to accept the local culture or speak out in favour of gender equality.

Despite these issues – *and indeed, because of them* – the learning opportunities for Community OR practitioners are substantial. First of all, when working in communities where there is a strong culture of indigenous research, lessons can be learned about the full potential of community leadership in co-creating OR projects (also see Ackoff, 1970, who worked in a non-indigenous context, but one where the project was constructed to give local people full leadership responsibilities). The potential is there for much more exciting and community-relevant outcomes, and for alternative theories, methodologies and practices of Community OR that are culture-specific. The other significant opportunity for learning is to experience indigenous methodologies and methods and see whether they are transferable or adaptable to other cultures elsewhere in the world – with the permission of their indigenous curators, of course, and giving credit to the original contexts in which these approaches were developed. This could substantially enrich our Community OR toolkits, and is ethical as long as the sharing is voluntary and two-way; i.e., it is a case of indigenous communities enriching their own practice on their own terms as well as non-indigenous communities learning from them.

5. Conclusion

We have identified areas in which Community OR can enrich current research in multiple domains within and outside the decision sciences: humanitarian logistics; analytics; urban planning and community development; information systems and information technology; big and difficult data; smart cities; resilient cities; developing countries; diversity and inclusion; environmental issues; and indigenous people's issues. Across these domains, within and beyond OR, we have argued that all of the following aspects of COR can enrich our understanding of theory, methods and outcomes: its notions of intervention, local engagement and impact; its frequent concern for disadvantaged, underrepresented and underserved populations; its emphasis on problem solving processes as well as outcomes; its critical attitude and concern for ethics; its leaning toward qualitative and mixed method approaches; and, in general, its concern for community empowerment and social change.

It seems to us that greater engagement (beyond clients) and a critical perspective are particularly important when developing new approaches to analytic thinking for creative problem solving across disciplines and applications. While these notions are well accepted in some of the social

sciences and interdisciplinary areas such as planning, they are less commonly understood in the decision sciences – but this is where they arguably matter most, because the decision sciences are so concerned with application and impact. Thus, like Jackson (1987, 1988) and Midgley et al (2017a), we claim that a greater appreciation for the potential of COR principles, theory, methodology and methods – especially in relation to engagement and critical thinking – can enrich the decision sciences.

The analysis in this paper leads us to propose some potential implications for the theory, methods and practices within the decision sciences. First, the conception of 'community' can be broadened to address on-line as well as in-person communities; ones that are geographically concentrated as well as spatially dispersed; those that are defined by immutable versus changeable characteristics; and those that cohere around visible versus invisible individual characteristics (also see Midgley and Ochoa-Arias, 1999, for further thoughts on defining communities). This issue is especially salient to urban planning and community development, information systems and information technology, diversity/inclusion and environmental issues. In these domains, questions of what stakeholder groups 'count', how they are affected by decision problems and how their views can be incorporated into interventions are important and challenging.

Second, the notion of 'problem solving' can be broadened to encompass novel understandings of individual and collective values, motivations for action, cultural perceptions in organizations and social systems, as well as more traditional notions of policies, prescriptions and new procedures. This notion is important in humanitarian logistics, for example, where questions about how problems should be solved, and what the impacts of a problem solution might be on affected groups (beyond technical and logistical concerns), could receive more attention than they do at present, especially in the US OR context. This notion is important in a different way for indigenous people's issues, where cultural conflict, and the contrast between the perspectives of the researcher versus the researched, make traditional applications of OR problematic.

Last, the notion of a disciplinary 'home' or frame for inquiry can be loosened somewhat (especially in the US context) so that, for example, urban planning, analytics or information systems can become more accepting of COR thinking.

Regarding methods, we have argued that COR practitioners generally show a greater willingness than many others in the decision sciences to use mixed method designs to solve challenging problems; to connect interventions with systemic analyses wherever possible, rather than deal with superficial symptoms of deeper social problems; and to focus on high-impact human outcomes, as compared with technical system change. We see these concerns as especially

important for diversity and inclusion, dealing with environmental issues and working in developing countries, where multiple analytic methods are commonly applied within specific disciplinary domains, but less often imported across disciplinary boundaries. To take just one example, how could a traditional approach to diversity and inclusion based on decision science improve not just the operations and long-term viability of an organization, but generate impacts upon the lives of members of underrepresented or marginalized groups who may not participate within that organization at present? We suggest that any credible project addressing this question would have to engage communities in the manner that is common in COR projects.

Regarding practice, we are reminded of the importance of interrogating common, disempowering assumptions about the roles that communities and their representatives should play in relation to problem solving in the agencies that serve those communities. More openness and flexibility is needed, especially when identifying problems, to make sure that agencies are not missing crucial issues. Within projects, insights, modeling and suggestions for change need to be better connected to stakeholder values, to improve local relevance. Again, especially in the US context, we suggest that technological-managerial solutions are essential but not sufficient. These insights seem especially important to the analytics, smart cities and big data movements, which often appear more interested in technologies, markets and data than in ways that they can engage especially underrepresented communities and make tangible improvements in the lives of diverse groups of citizens.

These implications for theory, methods and practice may provide the basis for a research agenda that *engages COR with the decision sciences more generally*. Such an agenda should embrace concerns with inter- and trans-disciplinary inquiry, systems thinking, community engagement, equity and social justice, and the implementation of solutions that embrace changes to human as well as technological systems. The current fraught political environments in the US and the UK increase the importance of such values, and suggest that researchers outside of the US and UK have a special opportunity to develop extensions to COR and decision sciences to support local development and community empowerment based on empiricism and critical inquiry for improved problem solving.

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