Metatheory in Library and Information Science: 
A Nascent Social Justice Approach

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This article explores the use of metatheory as an integrative conceptual tool that can help analyze, direct, and enhance theory building, professional practice, and professional preparation in LIS. The field's historic under-examination of metatheories is addressed, the nature of metatheory is explicated, and an emergent social justice metatheory for LIS is introduced, with the intention of encouraging discussion and increasing awareness of both metatheoretical approaches and social justice in LIS. 

Keywords: metatheory, social justice, LIS education, theory-building, conceptual analysis

Introduction

I t is no secret that the information professions are functioning in increasingly complex environments, necessitating new perspectives for preparatory curricula and new theories for research and practice. Indeed, the need to develop, teach, and apply theory in LIS remains acute (Buckland, 2003; Hjørland, 2000; Thompson, 2009), and in response, LIS researchers and practitioners have created many useful conceptual frameworks, models, and theories (Pettigrew & McKechnie, 2001; Fisher, Erdelez, & McKechnie, 2005). 

In line with these efforts, the development, teaching, and application of metatheory can also bring critical clarity to challenges faced by LIS educators, students, researchers, and practitioners. Briefly, a metatheory is a set of assumptions that orient and direct theorizing about a given phenomenon (Lawler & Ford, 1993). The use and development of metatheory has long been considered a necessary component for the growth of theory in the social sciences (Alexander, 1982; Wagner & Berger, 1985). By extending theory and metatheory in a discipline, subsequent professional preparation and practice can also be enhanced. 

Although coverage of metatheory is somewhat scarce in LIS literature, approaches that can be used as metatheory have been developed (or borrowed) in the field in recent years, including phenomenology (Budd, 2005), everyday information practices (Savolainen, 2008), affective aspects of information (Nahl, 2007), and serious leisure (Hartel, 2005). But the application of metatheory in LIS has been limited. LIS theories frequently carry within them implicit metatheories, but they are often vaguely expressed, diminishing their usefulness (Bates, 2006; Vakkari, 1997). 

Social justice is one such metatheory that is under-developed in LIS. This is not to say that social justice activity has been lacking in the field. On the contrary, the information professions have long been associated with inclusiveness, civic-mindedness, and concern for the poor and under-served (e.g., Chatman, 1987; Childers & Post, 1975; Forsyth, 2005; Venturella, 1998). Discourse on the field's association with these and
other values often takes a human rights emphasis (e.g., Phenix & McCook, 2005; Samek, 2007; Samek & Rioux, 2008) or an ethics emphasis (e.g., Carbo & Smith, 2008; Cordeiro, 2009; Fleischmann, Robbins, & Wallace, 2009). The explicit term “social justice” is also now appearing with regularity in the literature (e.g., Britz, 2008; Jimerson, 2007; Mehra, Albright, & Rioux, 2006), but few studies of LIS are explicitly guided by established social justice theories, despite the social justice orientation that is implicit in many LIS works.

This article addresses the under-examination and lack of application of both metatheories and explicit, established forms of social justice in LIS education, research, and practice. The next section is an introduction to metatheory, distinguishing it as an integrating conceptual device. Following this introduction, diverse typologies of social justice that are especially relevant to LIS are reviewed. From these literature-based conceptual analyses, a nascent articulation of a social justice metatheory is presented as a promising emergent tool that can be used to analyze and direct theory building and professional practice as well as enhance LIS curricula. This exploration also shows how social justice, although not always overtly expressed, is truly a facet of modern LIS, giving weight to the argument that a social justice metatheory for the field can and should be explicitly articulated.

Metatheory: An Integrating Conceptual Device

Quite often, the term metatheory is used interchangeably with the more commonly used terms conceptual framework, model, theory, and paradigm. Perhaps this is because there is no consensus on these terms; the distinctions between these conceptual devices are not always clear cut. This is problematic, resulting in confusion that may inhibit or obscure the growth and application of theory (Bates, 2006; Poole, 1985; Wagner & Berger, 1985). Thus, to get a better understanding of how metatheoretical approaches can be used in library and information science, it is useful to review definitions of these terms.

A conceptual framework is a graphical or narrative description of the main elements of a given or emergent research problem (Miles & Huberman, 1994). Models are a kind of “proto-theory” (Bates, 2006, p. 3) that are somewhat more specific than conceptual frameworks, proposing testable (but still abstract) sets of relationships within a phenomenon (Model, 1994).

Both conceptual frameworks and models are used in the development or testing of theories, which are articulated sets of interrelated constructs, definitions, and propositions that present systematic views of phenomena. Theories specify relations among variables in order to explain or make predictions about phenomena (Kerlinger, 1986), or are discussed as a body of developed understanding about a phenomenon.

Metatheories are broader conceptual devices than theories, but are much less expansive than paradigms. Paradigms are broad, foundational assumptions about nature that are traditionally accepted by the scientific community (Kuhn, 1970). Paradigmatic shifts, also called scientific revolutions, occur when an anomaly “subverts the existing tradition of scientific practice” (Kuhn, 1970, p. 6). An example of a paradigm shift would be the discoveries made by Copernicus in the 16th Century, which placed the sun rather than the Earth at the center of the solar system (Kuhn, 1957).

As mentioned previously, metatheories are sets of assumptions that orient and direct theorizing about a given phenomenon (Lawler & Ford, 1993). They are typically characterized in the literature according to the type of function that they contribute to theory building and prac-
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For example, Berger, Wagner, and Zelditch (1989) indicate that metatheories are especially useful as clarifying devices. They help answer questions such as: What is the nature of the information context under inquiry? What is the appropriate level of analysis? What are the goals of the investigation? What methods and techniques are effective in reaching these goals? Berger et al. (1989) go on to say that the reflexive nature of metatheories reminds us to consider evaluation and outcomes.

Wagner and Berger (1985) suggest that metatheories promote overall theory growth, providing a framework in which unit theories (theory-data linkages that are empirically testable) can be analyzed and potentially connected. As unit theories are connected, they have the potential to become substantive theoretical research programs (families of inter-related unit theories that are made of theory-theory linkages) that can move along a continuum of elaboration, proliferation, and maturity.

Among LIS scholars, the philosophical aspect of metatheories is emphasized. For example, in her primer on theory-building in LIS, Bates (2006) suggests that when we take up a particular research approach, we consider some of the thinking behind the development of that approach. We should think of a metatheory as "the philosophy behind the theory, the fundamental set of ideas about how phenomena of interest in a particular field should be thought about and researched" (Bates, 2006, p. 2).

Hjørland (2000, p. 527) also reminds us that LIS is very much influenced by philosophical traditions, which may be implicit, explicit, recognized, or unconscious: "The deepest understanding of the field is provided by the study of underlying philosophical assumptions. This is, however, also the most neglected part." He urges the investigation of assumptions, methods, benefits, and drawbacks inherent in these philosophical approaches because these different positions have different implications for the kind of theory and ultimately the kind of practice done in LIS (Hjørland, 2000).

A perspective offered by Dervin (1999) perhaps summarizes all of these characterizations. She views metatheories as sets of assumptions about the nature of reality and human beings (ontology), the nature of knowing (epistemology), the purposes of theory and research (teleology), values and ethics (axiology); and the nature of power (ideology). This definition focuses on the integrating function of metatheories, offering a framework for research and for thinking and speaking about phenomena, addressing issues such as being and knowing, the nature of reality, and the values and goals of research and practice.

Typologies of Social Justice

Pursuant to the stated goal of presenting a nascent social justice metatheory, a brief review of established social justice concepts is now in order. Fundamentally, justice is explicitly and implicitly social. A socially-just society is generally understood to be one in which individuals and groups are treated fairly and enjoy an equal share in that society’s benefits.

For centuries, Western scholars have debated notions of social justice in many different disciplines, including law, politics, and philosophy (e.g., Plato, 1991; Barry, 2005), religion (e.g., Calvez & Perrin, 1961), and economics (e.g., Sen, 1999; Smith, 2003). In the 20th and 21st centuries, social justice concepts have been incorporated into discourses on human rights, government policy, public moral philosophy, and individuals’ needs (Jackson, 2005).

Given the longevity, complexity, and disparate provenance of these explorations, it is not surprising that consensus on a single characterization of social justice is elusive. However, several interrelated
typologies of justice and social justice have been developed. Mehra, Albright, and Rioux (in press) identify the following typologies as being particularly useful when considering social justice in LIS contexts because of their broad treatment of key aspects of social justice.

*Justice-as-Desert:* refers to giving a person what he or she deserves based on a consideration of consequences that result from decisions or actions (Ross & Miller, 2002). Under justice-as-desert, it is just for individuals and groups to receive goods, services, etc., that they deserve, merit, or are sanctioned to receive in society (Pojman & McLeod, 1999).

*Egalitarianism/Equity:* refers to the equal distribution of societal resources (Stein, 2006). Equity expands this notion of equal distribution of goods by taking into account political, economic, social, and cultural aspects of society. This may help address limitations associated with treating all people equally without considering historical or individual contexts that may have resulted in unfairness and injustice (O’Neill, 2003).

*Utilitarianism:* is a view of justice in which the good of society is favored over the good of the individual. Under this perspective, societal policies would maximize the welfare of many, even if this comes at the expense of an innocent few (Stein, 2006).

*Distributive Justice:* refers to the distribution of resources throughout society so that everyone is supplied with a certain level of material means (Fleischacker, 2004). An unequal distribution of societal benefits may be acceptable after the most basic rights and needs of people are met.

*Justice-as-Fairness:* holds that just societies must safeguard the rights of citizens because to do so is rational and fair (Rawls, 1971). Fairness is the result of situations in which: (1) extensive and equal liberty is ensured, and (2) societal benefits and burdens are arranged in such a way that the least advantaged persons obtain the greatest benefits possible.

To underscore the fundamental importance of the individual, we can add the notion of *Human Dignity* to these justice typologies selected by Mehra et al. (in press). Linking justice to an acknowledgment of an individual’s innate human dignity is a key feature of Catholic social teaching, which has influenced both early and modern discourse on social justice (e.g., Pontifical Council for Justice and Peace, 2005; Pope Leo XIII, 1891). Fleischacker (2004, p. 7) offers a parallel secular view, asserting that the modern concept of social justice includes the belief that each individual “has a good that deserves respect, and individuals are due certain rights and protections in their pursuit of that good.”

These typologies (by no means an all-inclusive list) are useful for guiding discussion and for creating a general understanding of social justice. Taken together, they suggest that social justice emphasizes equality, fairness, the common good, and humanism. Yet as indicated earlier, these typologies are complex and diverse, and they give no indication on how they can be applied within particular fields, such as library and information science. The next section positions metatheory as an integrating, high-level conceptual tool that can help overcome this application challenge.

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Hartel (2009) and Bates (2006) indicate that working with and developing metatheory is an unruly process. However, by considering some extant LIS literature, the aforementioned social justice typologies identified by Mehra et al. (in press), and the aforementioned characterizations of metatheory (particularly Dervin’s (1999) integrative perspective), some of the basic assumptions of an emergent social justice metatheory can be outlined. This list of assumptions can
Assumption 1: All human beings have an inherent worth and deserve information services that help address their information needs. This assumption is also reflected in many of the foundation documents of LIS, including the Code of Ethics (American Library Association, 1995), and the Library Bill of Rights (American Library Association, 1980).

Assumption 2: People perceive reality and information in different ways, often within cultural or life role contexts. These contexts should be acknowledged when planning or implementing information services. Information needs, seeking, and use in different contexts have been examined in numerous socially-relevant works within LIS, including Chatman’s (1992, 1999) studies of the information behaviors of aging women and women prisoners and Hersberger’s (2002) work on the information needs of and sources of the homeless.

Assumption 3: There are many different types of information and knowledge, and these are societal resources. Widely available access to this information and knowledge is a common good that should be promoted and maintained. Libraries and library service have long been considered common goods, particularly in general discussions of public libraries and discussions of the role of the public library in the emergent information society (e.g., Molz & Dain, 1999; Shera, 1965).

Assumption 4: Theory and research are pursued with the ultimate goal of bringing positive change to service constituencies. This goal is a professional mandate reflected generally in the foundation documents of LIS, as well as in works showing how libraries and librarians constructively help their communities (e.g., Cordeiro & Filipe, 2004; Durrance & Fisher, 2005).

Assumption 5: The provision of information services is an inherently powerful activity. Access, control, and mediation of information contain inherent power relationships. The act of distributing information is itself a political act. These and other power issues associated with LIS are explored by Maack (1997), Mehra et al. (2004), and other commentators.

Taken together, these five assumptions constitute a nascent articulation of a social justice metatheory that can be applied within LIS. It is likely that a novel array of discourse and exploration topics will emerge as the choices, actions, requirements, and benefits associated with applying a social justice metatheory to LIS education, research, and practice become apparent.

For example, the LIS educator, researcher, or practitioner who chooses to adopt a social justice metatheoretical perspective will need to make this adoption explicit if his or her goal is to take full advantage of the benefits of employing metatheories (e.g., additional clarity, a framework for speaking and thinking about LIS phenomena, theory growth, etc.). This is not trivial. Library impartiality has long been perceived as a positive hallmark of the profession (Lewis, 2008), and social justice concepts are often linked to progressive or left-leaning political movements (Durrani, 2008). This may be a source of internal or external conflict for library educators, researchers and practitioners (Samek, 2007). On the other hand, choosing to use a social justice metatheory may also present opportunities within the classroom, the workplace, and the literature to discuss the political/power relationships inherent in the information professions.

The comfortable tradition of perceiving information work as “helping people” is an idea that may also be subject to criticism informed by social justice metatheory. Mehra et al. (2006) suggest that this concept contains underlying power inequities. Instead of practitioners
and researchers acting within an "ivory tower" role, they should form true partnerships with information user groups in order to bring about positive change and empowerment.

Engagement with social justice metatheory would also bring a renewed emphasis on the teaching of theory in LIS education. According to Thompson (2009, p. 119):

As students learn and understand the use of theory related to leadership, information access, information behavior, and other core topics germane to information studies [emphasis added], they are better prepared to advocate policy, and help design LIS curricula and other measures aimed at improving information access and understanding in the academic and practical environments in which they will practice.

As indicated in this article, social justice is surely a "core topic germane to information studies." Once an instructor articulates a social justice orientation, associated aspects can be discussed and explored in the classroom, especially within service learning projects and in core courses such as reference, professional foundations, information use and users, community engagement, collection development, library management, and research methods.

Social justice metatheoretical approaches are already featured in discussions of the global information society. For example, Britz (2008) presents justice as a "universally held value" that helps to promote within societies cultural diversity, human dignity, and a freedom that is socially inclusive and morally acceptable. These values are driven by a concept of social justice as a normative tool. Britz (2008) notes that the World Summits on the Information Society and UNESCO have promoted a moral agenda for the global information society, and asserts that the global information society is only sustainable if it is underpinned by a strong and generally acceptable moral foundation.

Not everyone will agree with this nascent metatheory for LIS education, research and practice, and there is likely to be much debate on the topics covered here, as well as a host of others. But this is a positive, given that the reflexive nature of metatheories leaves this proposed approach open to additional development.

Conclusion

The world's dynamic information environment has been the source of new economies, new types of employment, new types of learning, and powerful new information access and sharing methods. At the same time, it has made the library and information sciences much more complex—the profession and its associated research and education activities are all shifting in response to these trends. Yet librarians remain staunch advocates of the user, being more aware than most that information mediation efforts are more important than ever, especially for underserved populations.

Given these challenges, it is important for LIS educators, researchers, and practitioners to discover ways to expand current curricula, theories, and practices. Social justice metatheory should be part of this discovery, as it offers new, robust ways of articulating the long-held altruistic stances of LIS to new generations of professionals, while reminding current researchers and practitioners of the field's roots. Social justice metatheory may also be useful for LIS researchers looking for new or supplemental evaluation frameworks.

Even though social justice metatheory has the potential to enrich and expand LIS conceptualization and philosophies, social justice metatheorizing is just beginning in the field. The intent of this article is to encourage discussion and development of both social justice agendas and social justice metatheorizing.
among LIS students, educators, researchers, and practitioners. The nascent social justice metatheory presented here is put forth for consideration, and is by no means complete. Additional development and examination of this promising approach would be well worth the effort.

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