Format Matrix

Use this matrix to organize comparisons of different formats, genres, topics, or other categories (rhizomes). The matrix helps clarify the apples and orange juice problem: that is, the fact that categories may not have characteristics that are easy to compare directly. The matrix compares rhizomes across several elements related to the rhizome as a *product* and its potential impact on *policy* goals and issues of the library.

Not every rhizome will have easily described characteristics for every element, nor are most of the elements easy to quantify. Once the matrix has been filled out, use a four-square comparison matrix (below) to locate the rhizome as best you can in relation to its rank on the product and policy comparisons.

Some rough and ready advice for interpreting the four-square comparison matrix is provided. However, by its nature an apples and orange juice problem cannot be reduced to a simple solution. The library will need to weigh both product and policy issues carefully in choosing among formats to add, withdraw, or emphasize.

Rhizome:

		High interest	
Product		**Consider adding**	**Add**
		Do not add	**Consider adding**
		Low interest	
		Low impact **Policy**	High impact

Product Analysis			
Rhizome	**Demand**	**Delivery**	**Cost Per Transaction**
Name of the category: can be (but is not limited to) an author, series, topic, genre, language, format, or combination.	*Qualitative*: Feedback from reader's assistance, environmental scanning, requests, availability measures, and formal surveys. *Quantitative*: number of uses, measured from circulation, preferably corrected to reflect underlying demand.	Particularly important in considering electronic resources: is the resource delivered externally or internally; number of simultaneous accesses; speed of retrieval time? For physical objects, are there packaging or potential damage issues?	Count external & internal transactions; determine full cost, including purchase, subscription, staff, operating, & overhead, minus cost recovery (fees); divide full cost by number of transactions.

Product Analysis *(continued)*

Content	Format		Life Cycle
	Attributes	**Affordances**	
Content	**Attributes**	**Affordances**	**Life Cycle**
Topics, subjects, genres, language, styles. Electronic genres include applications software, bibliographic files, full text, numeric files, & multimedia.	Format descriptors: physical or electronic; specifications for the delivery medium; visual, audio, print, and size characteristics; linear or non-linear structure.	How is the format used by its primary audiences? What functions does it serve?	At what stage is the rhizome in the product life cycle: introductory; growth; maturity; or decline? What market position should the library take in relation to the life cycle stage?

Policy Analysis

Rhizome	Audience	Goals
Name of the category: can be (but is not limited to) an author, series, topic, genre, language, format, or combination.	What is the current and potential audience for the rhizome: age, education, cultural background, occupational interests, entertainment and aesthetic interests, other descriptors? How does the rhizome relate to the audiences for the Public Library Association's service responses?	Are there goals in the library's strategic plan that the rhizome addresses, or is the rhizome largely unrelated to the goals in the plan?

Policy Analysis *(continued)*

Values	Resources		
	Target Size	**Target Age**	**Annual Cost**
Are there underlying values in the library's mission that the rhizome addresses, whether or not these are reflected directly in the strategic plan?	Estimate the eventual strength of the rhizome in your library: core, basic, full, or comprehensive. From this estimate the number of items in the collection when it reaches maturity, and the number of years it will take to grow the collection to mature size.	Estimate the target median age of the rhizome, typically between 5-10 years depending on the need for currency of content and the physical durability of the medium.	Double the target median age. Divide this into the target size to determine the annual number of items to add to the rhizome at maturity. Multiply the number of items by the cost per item to determine the annual cost.

High interest

Rhizome:

Product

Low interest

Low impact **Policy** **High impact**

High interest

Rhizome:

Product
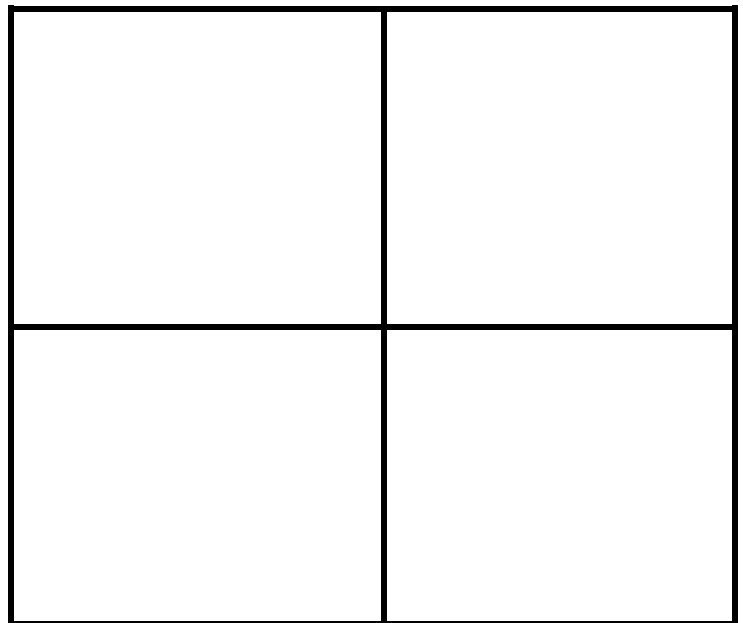
Low interest

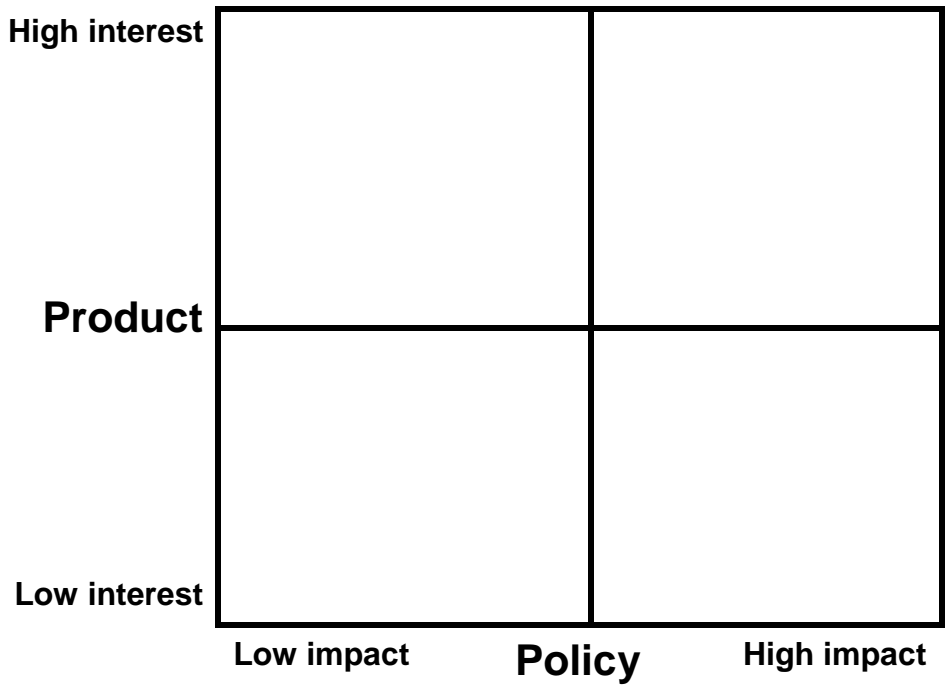**Low impact** **Policy** **High impact**

Rhizome:

High interest

Product

Low interest
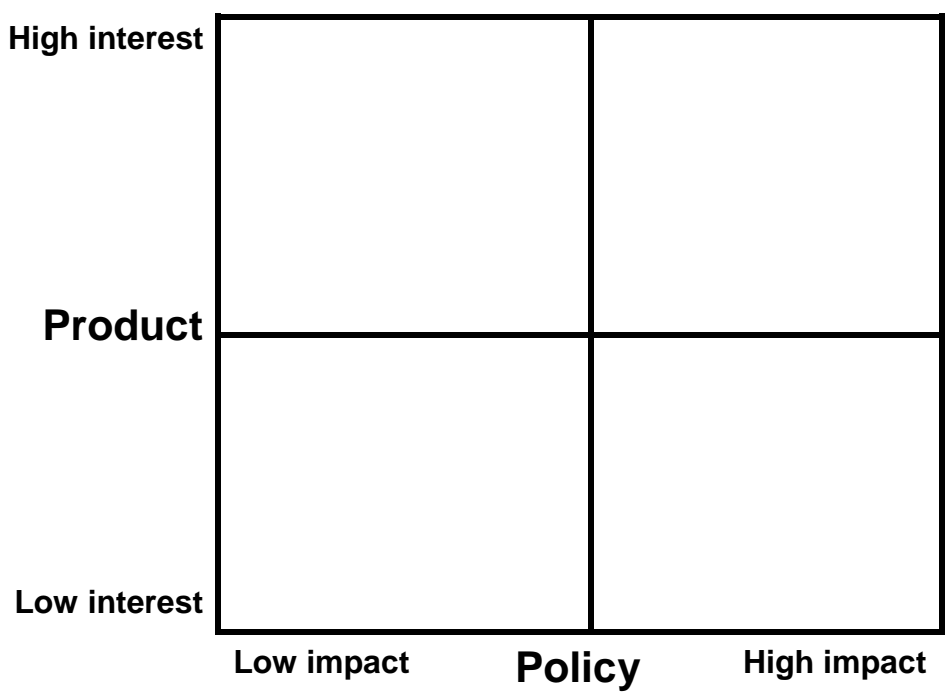
Low impact **Policy** High impact

Rhizome:

High interest

Product

Low interest

Low impact **Policy** High impact

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