

London Business School Company Report Collection Policy

1. Purpose of the collection

The London Business School's annual report collection has been developed to support the specific research interests of its faculty. Faculty research in the area of accounting and finance tends to have an historical, UK focus. The accounts of listed companies are most commonly required for this research.

The collection also doubles as a business collection, providing access to current reports for a variety of geographic areas for students on postgraduate courses and corporate library partners.

2. Scope of the collection

The priority for the London Business School Library Company Report Collection is the collection and retention of full Annual Reports and Accounts (and 10Ks for US companies). These are solicited from top companies each year and are catalogued on receipt.

Companies also tend to send other documents unsolicited, including interim reports, environmental reports and prospectuses. These are retained but not catalogued. Other material that appears to have significant informative value is retained at the Corporate Assistant's discretion. Interim reports and 10Qs are retained only until the full annual report or 10K for the periods they cover is received.

3. Management of company relationships and bibliographic control of company names

Company names

New companies are generally added to the database at ordering stage, before receipt of the actual document. They are given a 'working name', taken from the source used for selecting the company. Company names are entered in uppercase. On receipt of the document, the working name is checked against the registered name on the document, and the database entry adjusted if necessary (retaining uppercase characters). This leads to acceptable variations in the use of AND/& and PLC/P.L.C etc.

Company relationships

When a company changes its name, merges or demerges or acquires/is acquired by another company, a new record is created on SCoRe for the new name of the company, and links established between earlier and later names.

NB Company records are only created if documents are held for that company. In other words, if London Business School collects company X and it merges with company Y to form company Z, we would create a new record for company Z and attach company Z documents to it. Documents catalogued under company X would remain under that heading. We would not establish a record for company Y unless documents were held for that company.

In addition to establishing links between company records, we also add a brief description to the company record, outlining the circumstances surrounding the name change. This information is intended as a guide only and is not a full account of the change.

Identifying companies

Companies House registration numbers are added to the records for UK companies in order to uniquely identify them. A unique identifier for non-UK companies needs to be sought.

4. Impact of electronic publishing

A printed copy of the annual report is always requested from companies. However, if we are informed that a printed copy is not available, a print-out is made of the web version of the report and this is added to the collection. A note is added to the Holdings Notes field of SCoRe, e.g. '2000 is a print-out'. We would not stop collecting a company's reports if there was no available printed version, nor would we link to the company's website or other electronic source in case the report moved location/was removed from the site.

5. Subject indexing

Companies are indexed using FT sector headings.

6. Selection of companies/use of rankings

Each year, rankings are obtained for each geographic area of the collection, and reports are solicited from companies included in those rankings. Rankings used are as follows:

UK – Top 1000 by market capitalisation (derived from Datastream)

Europe - Top 500 by market capitalisation (derived from Datastream)

USA - Fortune top 500

Canada - Top 100 (from FT Top 500 supplement)

Japan - Top 100 (from FT Top 500 supplement)

Asia-Pacific - Top 100 (from FT Top 500 supplement)

In addition, we request reports from 100 not-for-profit organisations every year. This set of organisations seldom changes.

When companies drop out of a particular ranking, we cease to collect their report for reasons of space and relevance.

7. Geographical coverage

For areas covered, see above. Reports are retained indefinitely for UK companies and not-for-profit. A maximum of 10 years of reports is kept for non-UK companies.

8. Management issues

Reports are actively solicited on an annual basis via a mail shot, following the publication or derivation of the year's rankings. Postal and email address details for companies are checked against reference sources and added or updated, if necessary, prior to mail shot. A mail merge is performed for each ranking and a set of emails sent, and, where no email address is known, letters produced in MS Word. These letters are then sent off to the companies.

Reports are not routinely claimed.

9. Conservation issues

London Business School does not currently have a policy with regard to conservation of any of its resources.