

# **London Business School Library: RSLP full bid**

## ***Company annual reports: assuring the distributed national print archive***

### **1. Contribution to the distributed national resource**

Company annual reports are important primary documents for business studies and economics. In addition to supplying legally required financial data about company performance year on year, annual reports assist in the interpretation of these accounts by the inclusion of qualifying Notes (normally omitted from electronic company database sources). They often include a considerable amount of other information (such as descriptions of products and services, illustrations, charts and photographs) additional to that legally prescribed for the annual return, and provide an opportunity for companies to market themselves to investors. Annual reports are public documents, provided to investors by law, and are usually available free of charge to libraries on request. Copyright restrictions are often waived by the rights holders, facilitating the use and distribution of annual reports.

Annual reports collections are held by HE libraries supporting business studies courses. Many libraries focus on current material only, limiting their collections to three or five year holdings. Furthermore, the availability of company financials electronically, the emergence of commercial full text and image services with coverage dating from the late 1980s, and the increasing likelihood of companies also publishing annual reports on the web, have all led to a de-emphasis on print collections. Many libraries no longer actively solicit annual reports from companies on a yearly basis and are increasingly discarding older material. Outside HE annual reports collections are held in some public and national libraries. Companies House does hold a full set of statutory filings dating from 1880, with annual reports where these have been supplied voluntarily. Documents filed since March 1995 are available as images to be viewed online or downloaded. However access to this material is charged.

This project defines historic annual reports collections as those which contain significant pre-1995 UK material. 1995 has been chosen as the cut off date both because it marks the start of the Companies House electronic service and because it excludes those collections with a five year or under retention period. HE annual reports collections usually contain reports from both UK and international companies. However most collection holdings strategies in UK HE have emphasised UK material, especially for preservation.

This project aims to contribute to the distributed national resource in six ways:

- Create a comprehensive web-based catalogue of instances of UK annual reports available in UK HE institutions with substantial historic (pre 1995) holdings with links also to public and national sources. This will enable researchers to trace materials, of which there may be few surviving instances, and which pre-date electronic collections.
- Provide, via a project web site, information about the criteria used to decide which annual reports to collect, for the UK and internationally, in UK HE. This will help researchers to identify relevant collections; and also provide a central point for information sharing to support libraries as they develop collection and retention policies.
- Assess the possibility of providing a document delivery service for annual reports within HE. This could be based on re-using document delivery technologies developed for the JISC eLib projects HeadLine and LAMDA, with which London Business School and Manchester Business School are associated.
- Address collection development issues for annual report literature such as criteria for selection (use of rankings, geographical coverage), retention policies, bibliographic control, subject classification and anticipated usage.
- Explore the technical standards i.e. bibliographic record and document image format for discovery and, where appropriate, delivery of annual reports. The bibliographic and management characteristics of annual reports have often led to their omission from library catalogues. The project will investigate the technical options for creating a union catalogue, whether physical or logical.
- Investigate the potential for the development of a national collection strategy for annual reports literature. By bringing together major HE collections, the British Library and the Guildhall Library, which holds the only publicly available complete collection of annual reports for UK listed companies from 1880 –1964, the project is in a unique position to

make real progress in developing a national collection strategy. It is also the intention to approach major commercial suppliers of full text annual reports.

## 2. Importance to researchers

- Annual reports are primary documents, original sources of business data revealing social, economic and cultural history.
- There is a legally specified minimum content for publicly held companies, to be circulated by law prior to annual shareholders' meeting; many companies also take the opportunity to present additional information including illustrations, charts and photographs.
- Annual reports are important source documents also for the study of communication strategies (branding, language, style) and design (use of colour, text layouts). This information is not available in statutory data extracts and numeric company financials databases.
- There is a need for UK HE to take some responsibility for preserving UK historic annual report literature for scholars world-wide. It is dangerous to rely exclusively on other sectors; commercial sources, even where available, may be too expensive for many researchers to access. Many products are aimed primarily at a corporate audience (city institutions, corporate lawyers) and may not address the needs of researchers. Older material may never be commercially viable to digitise.
- Specific support for this project from academic researchers:
  - Professor Chris Higson, Associate Professor in Accounting, London Business School:** "As one of the leading researchers using UK public company accounts data, not only would a catalogue of hard copy annual reports be desirable it is urgently needed. London Business School, together with Cambridge University, is currently trying to produce a comprehensive long series electronic company accounting database for economic research - comparable to the US Compustat database which has back data from the early 1950s onward. Accounting faculty are finding large gaps in the existing electronic records which commercial information providers have been unable to fill, thus requiring reference to hard copy resources. Very often companies themselves and other holders are throwing away these valuable old annual reports. An additional problem is the natural wastage of public companies that disappear or merge by acquisition or takeover. "*Crisis*" is not too strong a word to describe this scenario. Both micro- and macro-economists are affected, seriously impairing the ability of UK researchers to pursue historical research for domestic companies."
  - Dr. Mike Staunton, Research Fellow, London Business School:** "As an academic who has been involved in compiling a stock market index going back to 1900, using original documents, unlikely ever to be transferred into electronic format, my view is that there is a strong case for the careful preservation of such valuable paper archives. Electronic information (starting typically from the early 1970s) can be obtained from a number of different sources; however paper collections, once neglected, can never be replaced. Such a cataloguing process will increase the use made of paper collections for academic research and will also help preserve them for future generations."
  - Dr. Rob Bryer, Reader in Accounting, University of Warwick:** "I wholeheartedly support this proposal. It will, I believe, be of great benefit to the UK accounting and business research community."

## 3. Description of collections

An initial survey of annual reports collections held in UK HE show that most of the historic collections are held at business schools with a strong research focus: London, Manchester, Strathclyde and Warwick. Some libraries focus on a particular sector such as organisations concerned with the arts (London Institute) or with banks and utilities (LSE). Many other HE libraries collect only current material, and some are discarding their print collections in favour of electronic sources.

Collection criteria used in HE:

- Market capitalisation: collection based on published rankings by market capitalisation such as the Times 1000 (now ceased), the FT 500, Fortune 1000 etc.
- Geographical coverage: categories include UK, local regions, European, USA, Latin America, Far East, Japan, Commonwealth.

- Sector: collection based on specific sector(s) only; inclusion of public bodies (not referenced in rankings).
- Local criteria: companies with a connection to the institution etc.
- Retention period: length of holdings, policies for holdings of companies which fall out of rankings etc.
- Collection completeness: procedures for acquiring material; frequency of reviewing rankings and company addresses, soliciting and claiming material.
- Format: paper or microforms; state of preservation of items with collections.
- Access issues: open or closed access; availability to researchers in HE. NB. Access to material in electronic format is restricted by commercial licence, usually to members of the licensing institution only.
- Perceived usefulness: likelihood of material being requested by researchers.

### **Major annual report collections in UK Higher Education**

- London Business School Library  
Times Top 1000 UK companies in many cases back to the 1950s/1960s, plus public utilities; Fortune 1000 US companies, ten year holding; Times European 1000 companies, five year holding; 100 top Japanese companies plus others from round the world. All reports open access; some on microfiche (Stock Exchange and MIRAC).
- Manchester Business School Library  
Times Top 500 UK, 250 European, 250 US, 50 Japan, 50 Banks (Banker), major North West, MIRAC.
- University of Strathclyde Library  
Times Top 1000 UK companies including historic holdings back to 1976, and in some cases back to 1930s; 100 Scottish; top 100 European. Current reports in Short Loan Collection, rest accessible on prior application.
- University of Warwick Library  
Selection of 400 prominent companies in the UK and US, with holdings mostly covering the 1980s and early 1990s.
- Other HE institutions  
Preliminary research suggests that several other HE institutions hold pre 1990 material in specific areas, such as the London Institute collection (BBC); LSE (banks and utilities). This material will be identified by the collection survey and may be included in the web-based catalogue if agreement can be gained from the holding institutions and if technically feasible.

### **Major annual report collections in the public sector**

- Guildhall Library, Corporation of London  
Stock Exchange collection 1880 – 1965; complete collection of quoted companies annual reports. Closed access (48 hours notice required).
- British Library  
Top 1000 UK, Top 500 Europe, Top 500 USA, Top 500 Commonwealth, Top 500 Far East, Top 500 Japan, Top 300 Far East. 5 year holding; UK companies sent to Humanities collection (closed access), rest discarded.
- Companies House (operates fee-based service)  
Statutory remit to collect and supply statutory company information required under the Companies Act. Holds all UK official filings since 1880. Documents filed since March 1995 now available as images through Company House direct (charged service) or in London; older material held in Cardiff (fetching charges per document). Annual reports held if supplied with filings - currently subject to DTI review re. future holdings policy.

### **Commercial services**

A number of commercial services providing electronic access to full text company annual reports from late 1980s onward are available. However subscriptions are expensive and licensing conditions restrict access to members of the subscribing institution. This makes it difficult or impossible to accommodate the needs of visiting researchers unless they become officially part of the subscribing organisation's staff.

### **Selective list of commercial services providing Annual Reports**

The following services offer electronic access to the scanned image and/or ASCII full-text of quoted UK and international companies' annual reports.

- Company Data Direct ([www.fisonline.com](http://www.fisonline.com)): covers some 20,000 firms listed on international stock exchanges; provides annual reports images in compressed TIFF format from 1996 onwards.
- Companies House ([www.companieshouse.co.uk](http://www.companieshouse.co.uk)): document image database: filings including Annual Reports for all UK registered companies from March 1995 onwards.
- Global Access ([www.primark.com/ga](http://www.primark.com/ga)): up to ten years of annual reports document images for 67,000 international firms.
- Perfect Information ([www.perfectinfo.com](http://www.perfectinfo.com)): UK public company annual reports (11 year archive); European public company reports (3 year archive); Asia / Pacific Rim public company report & accounts (3 year archive)
- Laser D: supplies annual reports for international companies from early 1990s on numerous CD-ROM disks (but now mainly superseded by Global Access web service - see above).
- LEXIS/NEXIS ([www.lexis-nexis.com](http://www.lexis-nexis.com)): provides searchable ASCII full text from 1989 of UK listed companies plus "top 500 European" firms; also US SEC Filings from 1987. Archives of corporate annual reports for US firms for 1972-1983.
- CAROL Company Annual Reports Online ([www.carol.co.uk](http://www.carol.co.uk)) : free web-based service for recent annual reports.

Issues arising from commercial annual reports archives

Although commercial services have useful academic research applications, a number of inherent limitations persist:

- Most commercial services offer only relatively shallow archives of up to 5 or 10 years
- There is little or no business imperative to extend existing archives by retrospectively scanning earlier material, since most commercial interest concentrates on a rolling 5 year period.
- Complete, scanned images of the original annual report documents are normally only available for the past 5 years; ASCII text versions will necessarily have to omit any graphical material such as charts, photographs and other illustrations.
- Each service must be searched separately as no union list of holdings information exists; instead, each service provider's product literature must be separately consulted. It is clearly not in the vendors' commercial interests to publicise a rival's service.
- Even in the case of primarily numerical financial database information services offering more extensive archives -- such as Datastream-- company accounts data therein are essentially *extrapolations* from the original published reports. Such data are thus divorced from the necessary supporting context of Notes to financial statements as found in printed annual reports.

#### **4. Purpose of project**

The project aims to provide a comprehensive resource for researchers interested in using annual report literature and to provide a focus for the development of a national strategy for ensuring continued access to this literature:

##### **4a. Contribute to the Distributed National Resource by providing a single access point for researchers trying to identify historic material or the availability of free to use annual reports collections:**

- Create a union catalogue describing specific instances of annual reports in those HE libraries which have substantial historic (i.e. pre 1995) UK holdings. Where data is available the catalogue will also include current holdings and international annual reports held by the partner libraries.
- Develop a project website describing annual reports collection policies of UK HE institutions, including both UK and international material.
- Assess the possibility of providing a document delivery service to HE researchers. This could be based on the EEDD technology developed for LAMDA and HeadLine which enables facsimile copies of documents to be created on demand and held on a server to be accessed via the Web. In the case of annual reports this method of delivery is

facilitated by the frequency with which the copyright holder, that is the company producing the report, allows free unrestricted copying of this type of material.

#### **4b. Address collection management issues relevant to librarians responsible for annual report collections.**

The project will make use of Stock Exchange Official Yearbook (now Macmillan Stock Exchange Yearbook) as a guide to company information issues and project coverage. The Stock Exchange Official Yearbook is an annual guide to companies listed on the London Stock Exchange. It contains information about official company name, company structure (subsidiaries etc.), FTSE sector etc. and provides useful guidance to a number of collection issues listed below.

Collection issues include:

- **Definition of the scope of an annual report collection.** In addition to the annual report itself there are a number of other related documents such as interim reports, prospectuses etc. which may find their way into collections and which may be of importance to researchers. Approaches to collecting, retaining and recording this material varies. The definition of what comprises critical company documents, and the incorporation into descriptions of the existence of associated material, at item or collection policy levels, are important collection management issues to formalise.
- **Management of company relationships and bibliographic control of company names.** Over time a company may merge, acquire other companies, divest parts of the company, change its name or wind up. This presents a number of bibliographic issues, especially in the creation of a union catalogue where libraries may have followed different cataloguing practices. AACR 2 recommends that if the name of a corporate body has changed, a new heading should be established under the new name for items appearing under that name. Explanatory references should refer from the old heading to the new and from the new heading to the old.
- **Impact of electronic publishing.** Increasingly, companies are making their annual reports available over the web and in time the requirement to provide print documentation may be reduced. Electronic deposit of legally required information is also on the horizon. The fluidity of electronic publication, and the ease with which content can be updated may make it more difficult in future to establish definitive content in the way possible in print versions.
- **Subject indexing options.** The ability to select reports of companies within a particular industrial sector is a valuable aid to the utilisation of a collection. General classification schemes such as Dewey or Library of Congress are less useful in this context than specialised schemes such as the Standard Industrial Classification or the Financial Times sector classification. The creation of a union catalogue will need to address the issue of the employment by participating libraries of different subject indexing tools.
- **Use of rankings.** The use of rankings helps to ensure a collection's relevance. The most commonly used rankings have been the Times 1000, the Fortune top 1000 and the Financial Times 500. The Times 1000 ceased publication in 1998 and many libraries that were using it have switched to the FT 500. An alternative ranking, such as the Top 5000 European Companies (published by Graham & Whiteside), needs to be identified by libraries wishing to collect the top 1000 UK annual reports. Another point to address is whether or not to continue collecting a company's reports once it has dropped out of the rankings. Continuity ensures consistency of holdings but may swell the collection to unmanageable proportions.
- **Geographical coverage.** The main focus for most libraries, particularly for archival holdings, is on UK companies. This limitation may prove increasingly frustrating as companies become more international in scope and activities.
- **Management issues.** The idiosyncratic bibliographic and management attributes of annual reports have made them problematic for libraries to administer. In bibliographic terms they are annual serials, in management terms annually solicited gifts. They do not fit easily into most commercially available library management systems and for this reason are often managed in separate, locally constructed databases. The project will investigate the best means of creating a union catalogue using physical and logical means.

- **Usage issues.** The project will investigate the extent to which older material is used as a measure to inform institutional collection development and national strategy policies.
- **Conservation issues.** Some older material is now delicate and/or in poor condition. The project aims to highlight conservation issues affecting the long-term availability of historic annual reports.

The British Library will participate in addressing the collection management issues outlined above.

**4c. Highlight the need for UK HE libraries to take some responsibility for ensuring continued availability within the sector of free to access UK historical annual report literature; and provide a framework for developing a national collection strategy for company annual reports. Actions include:**

- Discuss and clarify the roles of the British Library, HE libraries with substantial historic collections and public libraries in ensuring that historic UK annual reports literature is available to researchers. The project will investigate the creation of a national collection strategy for this literature and will, as a minimum, deliver a well-publicised collection policy statement describing the commitment of the key bodies towards preserving and collecting annual reports literature.
- Review commercial services providing electronic access to full text annual reports. The project will approach relevant commercial services with the view to identifying opportunities to establish an HE deal to provide ongoing electronic access.
- Review national provision elsewhere, especially USA, to provide a context for the development of the UK national collection strategy.

**5. Research impact**

The anticipated benefits of the project can be summarised in terms of simultaneously providing better discovery tools for the researcher and defining a national collection and preservation strategy.

- The continuing absence of a national union catalogue of annual reports holdings makes the researcher's task of locating a specific document unnecessarily arduous.
- Linking the disparate catalogue holdings (some of which exist solely as printed lists that can be consulted only within the archive building itself) would provide welcome coherence to replace the present assortment of different finding tools.
- Mapping and monitoring both holdings and collection strategies via a consolidated annual reports catalogue would serve an additional valuable purpose -- the urgent need for a *concerted preservation strategy* that as a first priority seeks to prevent loss through disposal of numerous and perhaps unique collections of primary documents for business research
- The existence of a national electronic catalogue could therefore serve as a beacon to generate and sustain interest in -- and increased sensitivity to -- the issues surrounding use and preservation of specialised annual reports collections

**6. Lead institution, partners and collaborators**

Lead institution: London Business School Library (Helen Edwards, Head of Library)

**HE partners:** Manchester Business School Library (Brian Clifford); University of Strathclyde Library (Christine Reid, Elaine Blaxter); University of Warwick Library (Hywel Williams);

**Collaborators:** Guildhall Library (public library) (Andrew Harper); British Library (national library) (Ann Peacock)

**7. Project management**

A project steering committee will be set up including members from each partner institution and any RSLP nominees with the remit to advise the project and monitor progress.

The project will be based at London Business School Library, under the overall responsibility of Helen Edwards, Head of Library. Gill Dwyer, Deputy Head of Library at London Business School, responsible for collections and bibliographic services, including the annual reports collection, will provide project management and be responsible for reporting to the steering committee and RSLP. The Project Officer will report to Gill Dwyer. Jonathan Eaton,

Electronic Resources Manager at London Business School, will advise on technical and standards issues.

## **8. Start and finish dates**

October 2000 – September 2001

## **9. Milestones and targets**

The project will be organised in a series of work packages running in parallel. Deadlines assume a starting date of 1 October 2000, to be adjusted as necessary. The projects will be divided into 4 quarters with the following deadline dates: Q1 (31 December 2000), Q2 (31 March 2001), Q3 (30 June 2001), Q4 (30 September 2001)

### **WP1. Project website**

- Set up project website describing aims of project. Q1
- Establish communication mechanism for HE libraries to alert project to changes in collection policy. Q2
- Conduct survey of UK HE libraries annual report collection policies. Q2
- Summarise survey results on project website. Q3
- Publish work in progress on collection management, usage and technical standards issues and final studies. Q3 / Q4
- Create links to non HE sources of company annual reports and to other, including international sources of annual reports literature, identified during the course of the project. Q4

### **WP2. Creation of union catalogue of annual reports collections**

- Detailed review of partner collections leading to agreement of methodology and standards for establishing union catalogue. Q1
- Definition of data structures for union catalogue; creation of union catalogue database or methodology for creating logical union catalogue from institutional catalogues. Q1
- Exploration of methodology for updating union catalogue. Q1
- Editing of annual reports records to meet project standards at partner institutions. Q2
- Establishment of logical catalogue / data import into union catalogue. Q2
- Editing and rationalisation of union catalogue. Q3
- Publication of union catalogue on project website. Q3
- Implementation of update processes as required. Q4

### **WP3. Exploration of collection management and technical standards issues.**

- Identification of collection management issues for annual reports literature as part of the detailed review described in work package 1. Q1
- Identification of technical standards i.e. bibliographic record and document image format for discovery and delivery of annual reports. Q1
- Establish a mechanism for collecting usage statistics for pre 1995 company annual reports. Q2
- Publish work in progress on collection management and technical standards issues on project website; invite comments. Q2
- Publish final report on collection management and technical standards issues. Q4

### **WP4. Document delivery services**

- Explore the potential for using EEDD technology to provide document delivery services for historic annual reports to HE researchers. Q2
- If feasible set up pilot scheme between HE project partners. Q3
- Evaluate issues involved in extending the document delivery service to rest of UK HE. Q4

### **WP5. National collection strategy**

- Through a series of discussions between project partners and other interested HE and public sector libraries, produce a collection policy statement describing the commitment of the key bodies towards preserving and collecting annual reports literature. Q3
- Explore the option with commercial suppliers of an academic deal for company annual report literature. Q3

- Review of national provision elsewhere, especially USA, to provide a context for the development of the UK national collection strategy. Q3
- Publish progress towards development of a national collection strategy and outcomes of negotiations on the project website. Q4

#### **WP6. Dissemination and evaluation**

- Creation of steering committee comprising members from each participating institution plus any RSLP nominees. Q1
- Initial planning workshop for partners and interested participants. Q1
- Launch of project website and project communication mechanism. Q1
- Steering committee monitoring meetings. Q1, Q2, Q3, Q4
- Evaluation and dissemination workshop. Q4

#### **10. Deliverables**

Badged RSLP project website hosted by London Business School covering:

- Web-based catalogue of UK annual reports holdings in UK HE libraries holding significant pre 1995 holdings with links to other collections. Catalogue will also contain current holdings and international holding where these can be readily incorporated.
- Collection policies for annual report literature at UK HE libraries, with descriptions of and links to other significant collections in national and public libraries.
- Interim and final studies addressing collection development, bibliographic and management issues specific to annual reports literature, to be published on project website and distributed to HE libraries with annual reports collections and other interested parties.
- Collection policy statement describing commitment of key bodies towards preserving and collecting annual reports literature, together with details of any academic deals which the project is able to negotiate.

Other deliverables:

- Establishment of focus group to develop a national strategy for company annual reports and to enter into negotiations for an academic deal with commercial providers of electronic services covering full text annual reports.

#### **11. Applicable standards**

The deliverable of a web-based catalogue of UK annual reports instances available in UK HE institutions requires exploration and deployment of both existing and emergent technical standards. Company annual reports may be characterised as annual serials, and thus display hybrid bibliographic attributes. Annual reports share with serials the requirement for extensive holdings information – an issue which is still not entirely resolved in the Z39.50 protocol. There are additionally a number of library management issues specific to annual reports. Collection management requirements, such as the need to mailshot companies to ensure ongoing receipt, have often hitherto led to the use of proprietary standalone database solutions for annual reports records, rather than their inclusion in library catalogues.

Standards issues to be investigated include:

**Bibliographic records:** the project will investigate the Bath Profile for serials records in consultation with UKOLN and the M25 link project to adapt a generic serials template for annual reports.

**Collection descriptions:** e-Lib Standards Guidelines, version 2, and the UKOLN collection descriptions template will be used where applicable to describe collections in UK HE.

**Interoperability:** All HE partners to this project hold their annual reports records in electronic format, largely outside the library catalogue. Further discussion is required to determine whether the creation of a logical union catalogue using Z39.50 is possible or whether a physical union catalogue is in fact the pragmatic solution.

**Database:** technologies such as freeware SQL RDBMS will be investigated as a standards-based solution to providing a physical union catalogue, allowing maximum flexibility for web-based search and retrieval, should the creation of a physical union catalogue prove necessary.

**Document image format:** the project will evaluate the different technical standards in current common use for electronic document storage and delivery of annual reports, including the

Adobe Acrobat PDF and compressed TIFF document image formats. Issues for investigation here include

- scanned image quality
- storage density optimisation: minimising file "footprint" overheads
- efficiency for network delivery
- modularity (i.e. the facility to store annual reports in sections as well as entire documents to enhance retrieval options)
- requirement to install/use proprietary image viewing software

Commercial vendors will be consulted to provide a real-world perspective on these above issues.

**EEDD (Electronic End User Document Delivery):** the project will investigate the feasibility of providing access to the back collections of annual reports which are not available via the commercial providers. One possible technology is the enhanced EEDD service which is being developed jointly by the HeadLine hybrid library project and LAMDA, the document delivery service which developed from an e-Lib project. HeadLine has developed the basic EEDD technology under which materials requested by users are placed on a server and users download via the web to their PCs. Lamda has experience of using scanners and the Ariel software developed by RLG (Research Libraries Group) to digitise text and send it via the Internet to a receiving station, for example a printer in the Inter-Library Loans department. The proposed enhancement would enable scanned items to be sent to the server and downloaded directly by users to their own PCs.

If the technology is proven to work, it may be possible to locate scanners and Ariel work stations in the partner libraries and make annual reports available to HE researchers electronically. This would provide users with an alternative means of accessing the reports which may be located at a distance. The project would review the technology and copyright issues and develop a charging model for the supply of materials.

London Business School Library is a partner in the HeadLine project and Manchester Business School Library is a founder member of Lamda.

## 12. Evaluation

Ongoing monitoring by the project steering committee.

Widely publicised workshops at the beginning and end of the project.

Invitation to comment and establishment of communication mechanism on the project website.

Interim and final evaluation reports.

## 13. Dissemination strategy

**Project website** hosted at London Business School

**HE publicity:** British Business Schools Librarians Group, SCONUL, M25 Consortium of Higher Education Libraries – web links, e-mail news reports, presentations and announcements.

**Collaborators publicity:** web links, newsletters, inclusion in publicity material.

**Events:** 2 workshops:

- 1 day planning workshop to be held in London at the outset of project representing all partners and collaborators and advertised to other interested HE and public libraries
- 1 day dissemination and exit workshop at end of project focussing on deliverables, evaluation and ways forward

## 14. Exit strategy

Website maintenance and updating: London Business School Library

Developing a national strategy for annual reports collections and specific arrangements for ongoing updating of records by participating institutions will be explored as part of the project and will be the focus of the second workshop.

**15. Access policy**

All partner and collaborator institutions allow access to HE researchers on proof of ID, and in some cases prior application.

The project includes a document delivery pilot which may provide a means of remote delivery to HE researchers.

**16. Key contact**

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