

A Guide to Planning and Implementing an Archival "Blitz"

Yellowstone National Park Archives

For small repositories with limited access to assistance, tackling a processing backlog efficiently and cost-effectively can be difficult. We've designed an innovative way to accomplish this task - a "processing blitz". Modeled on the NPS's highly successful BioBlitz program, which uses students, volunteers, and scientists to conduct an intensive 24-hour inventory of all living organisms in a given area, a "processing blitz" deploys a small group to arrange and describe collections in a very short time period.

This guide outlines key considerations, logistical needs, and a daily breakdown for institutions interested in implementing their own processing blitz. It draws on lessons learned from Yellowstone National Park's Archives Blitz initiative and is adaptable to collections of varying sizes and complexities.

Key Considerations

When Does a Processing Blitz Work Well?

Processing blitzes are particularly well-suited for projects with defined timelines, such as those funded by grants. However, they can also be carried out with volunteer groups, especially when working with their own organizational records or a collection that already has an inventory. While funding can help, a strong pool of trained volunteers can be just as effective. Blitzes also lend themselves well to professional development scenarios such as Angel Projects or workshops.

Participants

Blitz participants can include a broad range of experience levels: archivists, graduate students, volunteers, and professionals from other fields.

Collection Selection

Selecting the right collection is key. Ideal collections have clear internal logic and organizational structure. Institutional or administrative records are usually the best candidates rather than complex, fragmented personal papers.

Tips:

- Avoid collections requiring intensive preservation work.
- For a five-day blitz, collections in the range of 40–100 linear feet are manageable, depending on the complexity and participants' familiarity with archival work. For the higher end of that range a good deal of the material should already be mostly organized

such as with case files. Even with limited experience, volunteers can typically process 40–45 linear feet effectively.

Space Requirements

Processing requires significant physical space, especially with multiple participants. Plan enough room for people and materials to move safely and comfortably and ensure enough chairs and workstations for the number of people. Use separate tables or areas to keep the series distinct and reserve shelves or carts to temporarily hold sorted materials. Ideally you should allocate at least one shelving unit per series so that they each have their own area.

On-Site Supplies

Ensure the following supplies are available on-site:

Reference Materials:

- Reference copies of records schedules
- Processing guidelines and sample finding aids

Tools and Materials:

- Sticky notes, pencils, erasers
- Posters or whiteboards
- Archival folders and boxes
- Labeling supplies (box and folder labels)
- Basic preservation tools (microspatulas, box spacers)
- Laptops, thumb drives, or access to shared drives for data entry
- Trash and recycling bins and plenty of trash bags.

Timeline

Pre-Blitz

Start with a preliminary inventory or choose a collection with known content, such as board minutes, committee files, or financials from a membership organization. Gather relevant background information, including any description and accession records and think about what series you want to break the collection down into. Also identify what pre-reading or orientation materials will help participants engage with the collection more effectively.

Pre-Reading Packet

Some helpful things to send to participants in advance include:

- Collection details and institutional policies
- Introductions to facilitators or team members
- Retention schedules (current and historic) — useful for identifying permanent vs. temporary records and understanding original functions.
- Examples of completed finding aids
- Internal processing manuals, if available

If your participants are new to archival work, consider sharing:

- This [article](#) by Mark Greene and Dennis Meissner, “More Product, Less Process: Revamping Traditional Archival Processing,” *The American Archivist*, 68 (Fall/Winter 2005), 208-263.
- [Society of American Archivists’ glossary](#) if they are unfamiliar with archival practice
- The [Archives Association of British Columbia’s Archivist’s Toolkit](#) is written specifically for a non-archivist audience and is time-tested; it’s second edition is in the works and completed portions are available online.
- The [Getty’s Introduction to Archival Organization and Description](#) is a bit more technical, but small enough to be quickly read and also available online.

Also include:

- Directions, parking details, schedule
- Lodging and transportation suggestions
- Local attractions or things to do

Day 1: Orientation and Initial Sorting

We begin the first day of the processing blitz with a round of introductions and a tour of the facility to familiarize participants with the workspace and resources. This is followed by an orientation session that introduces the project and provides essential context.

We introduce the collection: its origin, scope, and relevance to the institution’s mission. We also Review the institution’s collecting policy to identify any materials that may need to be removed or redirected.

We also discuss archival procedures, including:

- MPLP (More Product, Less Process) techniques, such as not removing paperclips or reordering items within folders.
- Original order.
- The records schedule and how to use it to evaluate materials.

- Going over a glossary of terms if participants are unfamiliar.

We encourage volunteers to take notes throughout the process. These notes are invaluable for writing the finding aid later and serve as a record of decisions made during processing.

If your group includes volunteers with less archival experience, it can be helpful to propose a preliminary series structure. These initial groupings can be refined after a first pass through the collection. More experienced participants may develop their own series.

Beginning the Project

Once the orientation concludes, participants begin familiarizing themselves with the records and thinking about what series to include. If you are having participants create the series then your move depends on if you already have a box list or inventory or not.

With a box list: Participants start reviewing contents of the inventory and considering potential series based on the existing descriptions.

Without a box list: Conduct a preliminary survey. Each participant uses sticky notes to label the general contents of each box. Keep descriptions broad (e.g., “meeting minutes,” “correspondence,” etc.) to support later series definition.

After this review, the group meets to discuss what they’ve found and propose a set of preliminary series. Together, define what each series includes to ensure a shared understanding going forward.

If you already have a series, then take some time to discuss what kinds of materials belong in each.

Initial Sorting

The sorting phase begins by physically grouping boxes by series, but contents within each box should not be rearranged yet.

If a box clearly fits into one series, place it on a designated shelf or cart labeled for that series.

If a box contains materials from multiple series or is difficult to classify, leave it in the unsorted area with a sticky note indicating it has been reviewed. Do not split up boxes at this stage.

It's helpful to also designate specific areas for:

- Materials that may be discarded
- Items potentially belonging to other collections

This initial sort typically takes up the remainder of Day 1 and often continues into the next morning.

Day 2: Refining Series and Folder-Level Sorting

If it hasn't already been done, begin by working with the boxes that contain mixed materials. Remove folders or groups of folders from these boxes and place them into empty cartons, organizing them under the appropriate series on the shelves. This step helps consolidate materials and prepares the collection for deeper review.

Once all boxes have been sorted into the proposed series, assign each series to an individual or pair of volunteers. These participants should conduct a brief review of their assigned materials to confirm whether the contents truly belong within the proposed structure. During this review, volunteers should take note of:

- The types of records present
- Key topics or functions
- General date ranges

After this initial pass, reconvene as a group to refine and finalize the series definitions. This group discussion is a critical “time-out” point in the process. Also give time for each group to report out on their series, any trouble they've been running into, and where they're at in arranging the materials. By sharing what they found, participants help clarify the boundaries of each series and identify any issues from the initial sort. It is especially important to make sure items are not being split up into different series.

At this stage, it's also helpful to begin discussing possible arrangement strategies within each series. Options may include:

- Chronological
- Alphabetical
- By function or department
- By format or record type

Encourage participants to share their ideas, as they'll often have useful insights based on their hands-on review. Volunteers should also begin taking notes on key details, such as dates and formats, subjects or organizational units represented and noteworthy or unusual items. These notes will be invaluable later when writing series descriptions and compiling the finding aid.

Remind volunteers to focus on folder or group-level review rather than reading individual documents. The goal at this point is to ensure correct arrangement—not item-level description. This phase typically lasts through the end of Tuesday and may extend into Wednesday, depending on the size and complexity of the collection.

Once the series are confirmed and clearly defined, you're ready to move on to sorting records within each series and, where needed, organizing them at the folder level.

Day 3: Series Review and Continued Arrangement

On Day 3, continue the box-level organization, refining the arrangement of materials within each series and preparing for the description phase.

To promote consistency and catch any issues early, schedule time for participants to visit each other's workspaces. This cross-review helps ensure that similar materials aren't being duplicated across different series and that processing approaches remain aligned. Around mid-day, hold a group meeting to revisit and discuss the series structure. This is an opportunity to clarify any lingering questions, share discoveries, and make adjustments based on what has emerged during deeper review.

Often at this point, new insights may prompt changes to the arrangement. For instance, previously separate series might be merged, or one series might be split into two. Staff can facilitate this discussion by presenting different options, along with the pros and cons of each.

As series arrangement continues, preservation interventions are kept minimal. Acid-free folders are added only when records were originally loose or stored in 3-ring binders that don't fit properly in archival boxes. Most materials are already housed in archival manuscript boxes, so replacement is only necessary when boxes are damaged, non-archival, or incompatible with shelving.

If photographs, oversized items, or other non-standard formats are encountered, note their presence but defer further preservation work. Documenting these materials now ensures they can be addressed later, without disrupting the blitz workflow.

Throughout the day, processors should continue taking notes on dates, contents, formats, and anything else that may inform later descriptive work. These notes will serve as the foundation for the next phase: writing the finding aid.

Day 4: Rehousing and Description

On Day 4, continue organizing materials within each series and if needed, rehouse records into new folders or boxes.

As part of this process, integrate any materials that were reassigned to different series based on earlier group discussions.

Day 4 is a transition point—from hands-on sorting to formalizing the results of the blitz. By the end of the day, much of the collection should be arranged and well-documented, setting the stage for final review and quality checks.

Day 5: Description and Wrap-Up

The final day of the blitz is dedicated to tying up loose ends, completing arrangement work, and shifting focus to documentation and description.

Once processors have finalized the physical arrangement of their series, they can begin working on descriptive outputs. We ask them to write:

A Series Description: This should summarize the formats, date ranges, and general contents of the series. Processors are encouraged to highlight major topics, significant events, or notable discoveries uncovered during their work. They are also encouraged to note how the series is arranged (e.g., chronological, alphabetical) and any relevant contextual information uncovered during processing such as missing materials.

A Container List: this was completed in an Excel spreadsheet pre-formatted with fields matching those in the CMS. The list is typically at the box or folder level and includes a descriptive title and an associated date. These spreadsheets are saved as CSV files and imported directly into the CMS for streamlined data entry.

To support contextual documentation, a large notepad or easel can also be set up in the workspace for the team to collaboratively build out an administrative history or timeline. Team members can contribute information they've found in the records, such as the start and end dates of major programs or the tenures of key personnel. This shared record often helps enrich the finding aid and inform future research use.

As the descriptive work progresses, you can begin preparing and printing box labels. If time permits, apply updated folder labels and shelve the fully processed collection in its final location.

As part of the wrap-up, we also ask participants to reflect on the process by sharing one thing that went well and one thing that could be improved. These informal evaluations have proven extremely helpful, and feedback from each blitz is incorporated into future planning to continually improve the process.

By the end of Day 5, the bulk of the collection is not only physically processed but also well-documented, with key descriptive work underway and valuable insights captured for ongoing use.

Post-Blitz Wrap-Up

After the on-site portion of the blitz concluded, we complete several follow-up tasks to finalize the collection for public access. This includes importing the series descriptions and container lists into our collection management system, completing the administrative timeline, and drafting the scope and content note. We also:

- Consolidated the separate container lists into a single spreadsheet
- Reviewed and unified the series-level descriptions for consistency
- Drafted and edited the collection-level description
- Imported all descriptive content into the CMS
- Exported and posted the finalized finding aid online
- Created a record in the library catalog
- Officially opened the collection for research use

These final steps were typically completed within a week of the blitz. Regardless of the collection's size, the post-blitz work—especially importing data into the CMS, revising descriptive content, and posting the finding aid—usually took no more than half a day to complete.

Keys to Success

Communication was essential throughout the entire blitz. Working with a large, often unstructured collection required frequent check-ins, openness to questions, and constant updates on progress. This ensured that everyone was aligned and moving in the same direction. In a shared workspace, communication also helped maintain awareness of one another's activities and the location of materials—keeping the project organized and efficient.

Equally important was team cohesion. We emphasized flexibility, curiosity, and shared learning rather than rigid productivity. Participants were encouraged to explore the park, ask questions, and engage with the environment and the team.

To support this, we incorporated a variety of enrichment activities throughout the week. This could include:

- Behind-the-scenes tours of the library, herbarium, museum, and historical vehicle collection
- Lunchtime talks from park historians, curators, and other resource staff
- Short hikes and wildlife watching excursions
- Informal discussions about careers in archives, libraries, and museums

These opportunities provided much-needed mental and physical breaks, promoted learning, and helped the group bond.