

Resource Calendar & *Capacity Plan*

Shows when each person or role is available, how many hours the plan asks of them week by week, and where demand exceeds capacity, so conflicts are fixed before they slip the schedule.

USE WHEN After the schedule (T28) and resource plan (T33); refresh monthly or each sprint	OWNER PM with functional managers	APPROACH ALL	TIER Standard
---	---	------------------------	-------------------------

HOW TO USE THIS TEMPLATE 1. List people and pooled roles with their allocation (section 1). 2. Record holidays, leave, and training that reduce hours (section 2). 3. Fill the weekly grid in the Excel companion; copy totals here (section 3). 4. Compare demand and capacity by period; resolve every Over flag (sections 4, 5). 5. Delete guidance text (<i>italic</i>) before sharing.	Project name · schedule (T28) version		
	Prepared by · version · date		
	Standard week (h) · Tight above (%)		
	Approved by · date		

Excel companion	T34_Resource-Calendar-and-Capacity-Plan_v1.0.xlsx does the arithmetic: a blank tab, a Northfield example, and a how-to. This PDF holds the summary, the decisions, and sign-off.
Hours a week	Quantity × allocation % × standard working week. A pooled role (six coordinators) is one row with its quantity.
Available · assigned	Available = hours the person can give the project that week, after holidays and leave · Assigned = hours the plan (T28, sprint plans) asks of them.
Utilization · spare	Assigned ÷ available · available – assigned. Negative spare is an over-allocation.
Flag	Over assigned above available · Tight utilization above the threshold you set · OK otherwise. A person's flag is their worst week; team totals can look OK while one person is Over.

Resource calendar, resource smoothing, and resource leveling are PMBOK® Guide 6th Ed. terms. Flag rules and the utilization threshold are common practice.

1 Resource roster

One row per person or pooled role from the resource management plan (T33). Allocation is the share of a standard week agreed with their manager. Leave allocation blank for resources tracked elsewhere, such as a fixed-price vendor, and say so in notes. Test: every name in the schedule (T28) appears here.

PERSON OR ROLE	TEAM	QTY	ALLOCATION %	HOURS A WEEK	FROM	TO	TIME ZONE	NOTES

2 Holidays and leave

Type: H holiday · L leave · T training · O other commitment (another project, a client launch, a time-zone limit). Lower available hours in the grid for H and L; book T as assigned hours. Test: every public holiday in the project window is listed.

DATES	TYPE	WHO	HOURS LOST	COVER PLAN

3 Weekly capacity grid

Write the Monday date of each week in the first row. For each person, give available hours and assigned hours per week; the Excel companion totals them and sets the flags. Copy this page for each further 13 weeks. Test: no Over flag is left without a decision in section 5.

PERSON OR ROLE		ROW	WK 1	WK 2	WK 3	WK 4	WK 5	WK 6	WK 7	WK 8	WK 9	WK 10	WK 11	WK 12	WK 13	TOTAL	UTIL.	FLAG
Week starting																		
	Available																	
	Assigned																	
	Available																	
	Assigned																	
	Available																	
	Assigned																	
	Available																	
	Assigned																	
	Available																	
	Assigned																	
	Available																	
	Assigned																	
	Available																	
	Assigned																	
	Available																	
	Assigned																	
Total available																		
Total assigned																		
Spare																		
Utilization																		
Week flag																		

4 Demand vs. capacity by period

One row per month, sprint, or phase. Demand comes from the estimate (T31) or schedule (T28); capacity from the grid totals. Name an action for every Tight or Over row. Test: total demand matches the hours in the cost estimate for the same window.

PERIOD	DATES	DEMAND (H)	CAPACITY (H)	SPARE (H)	UTILIZATION	FLAG	ACTION

5 Resolving over-allocation

Resource smoothing moves work only within its float so that demand stays under a limit. The critical path and end date do not change, but it may not clear every peak. Try it first.

Resource leveling changes start and finish dates to match demand to the people available. It clears the conflict but can lengthen the critical path and move the end date, so a baseline change follows the change control process (T65).

Other options (common practice): reassign the work, add or borrow a person, reduce or defer scope, or approve short-term overtime with the person's manager. Record each Over flag and what you decided. Test: the decision says what happens to dates and cost.

OVER-ALLOCATION (WHO, WEEK, HOURS OVER)	OPTION CHOSEN AND WHY	EFFECT ON DATES, FLOAT, COST	DECIDED BY · DATE · LOG (T55)

Project manager signature · date

Functional manager(s) signature · date

Sponsor signature · date (if leveling moves a baseline date)

COMPLETED EXAMPLE · ILLUSTRATIVE

Client Onboarding Portal · Northfield Creative Group (fictional marketing and design agency)

v1.1 April 26, 2027 · prepared by Amy Price with the studio leads and Priya Shah, checked before UAT · v1.0 approved with the resource management plan (T33) on January 29, 2027 · standard week 40 h · Tight above 85% · Northfield staff on Central time. Whole-project demand is 860 internal hours (T31); this window covers the last 13 weeks.

1 Resource roster

PERSON OR ROLE	TEAM	QTY	ALLOCATION %	HOURS A WEEK	FROM	TO	TIME ZONE	NOTES
Amy Price, project manager	PMO	1	50%	20	Jan 11	Jul 9	Central	About half time
Marcus Reyes, product owner	Client Services	1	50%	20	Jan 11	Jun 25	Central	Leave Apr 21 to 23
Priya Shah, IT manager	IT	1	40%	16	Jan 18	Jun 25	Central	Owns migration, cutover, hypercare
Elena Torres, contracts & privacy	Contracts & Privacy	1	10%	4	Jan 11	May 21	Central	30% to Apr 9; on call for CR-02 after
Account coordinators	Studios	6	5%	12	May 3	Jun 4	Central	2 in UAT at 50% May 12 to 21; training May 24 to 27
Studio leads	Studios	4	5%	8	Jan 11	Jun 25	Central	Steering and reviews
IT support analysts	IT	2	10%	8	Jun 7	Jun 25	Central	Walkthroughs and shadowing (T37 D5)
Clearpath delivery lead + 2 consultants	Vendor	3			Feb 16	Jun 25	Pacific	Fixed price; hours not tracked here. S1 at 80%; new consultant Mar 4

2 Holidays and leave

DATES	TYPE	WHO	HOURS LOST	COVER PLAN
Apr 21 to 23	L	Marcus Reyes	12	Amy Price answers backlog questions; acceptance at the Apr 27 review
May 24 to 27	T	Account coordinators (6)	0	Training booked as assigned hours (48 h); UAT done May 21
May 31	H	All Northfield staff	13	No project work; Clearpath on call Sat May 29; go-live Tue Jun 1
Jul 5	H	All Northfield staff	4	Closure tasks run Jul 6 to 9
All project	O	Clearpath (Pacific time)	0	Joint meetings 11:00 to 3:00 Central
Total			29	

3 Weekly capacity grid · April 12 to July 5, 2027

PERSON OR ROLE	ROW	APR 12	APR 19	APR 26	MAY 3	MAY 10	MAY 17	MAY 24	MAY 31	JUN 7	JUN 14	JUN 21	JUN 28	JUL 5	TOTAL	UTIL.	FLAG
Amy Price, project manager	Available	20	20	20	20	20	20	20	16	20	20	20	20	16	252		
	Assigned	16	16	16	18	18	18	20	14	16	16	16	18	14	216	86%	Tight
Marcus Reyes, product owner	Available	20	8	20	20	20	20	20	16	20	20	20			204		
	Assigned	18	8	18	18	20	20	16	14	12	10	10			164	80%	Tight
Priya Shah, IT manager	Available	16	16	16	16	16	16	16	13	16	16	16			173		
	Assigned	14	14	10	10	12	14	21	12	9	10	8			134	77%	Over
Elena Torres, contracts & privacy	Available	4	4	4	4	4	4								24		
	Assigned	3	2	2	1	1	1								10	42%	OK
Account coordinators	Available				12	48	48	48	20						176		
	Assigned				6	40	40	48	18						152	86%	Tight
Studio leads	Available	8	8	8	8	8	8	8	6	8	8	8			86		
	Assigned	5	5	6	5	5	6	6	4	4	4	6			56	65%	OK
IT support analysts	Available									8	8	8			24		
	Assigned									6	6	6			18	75%	OK
Total available		68	56	68	80	116	116	112	71	72	72	72	20	16	939		
Total assigned		56	45	52	58	96	99	111	62	47	46	46	18	14	750		
Spare		12	11	16	22	20	17	1	9	25	26	26	2	2	189		
Utilization		82%	80%	76%	72%	83%	85%	99%	87%	65%	64%	64%	90%	88%	80%		
Week flag		OK	OK	OK	OK	OK	Tight	Tight	Tight	OK	OK	OK	Tight	Tight	OK		

Navy = Over · gold = Tight. Clearpath (row 8 of the roster) is on a fixed price and not tracked in hours. Available hours already reflect leave Apr 21 to 23 and the holidays May 31 and Jul 5.

Reading the example: the week of May 24 shows the team at 99%, which reads as Tight, not alarming. One row down the truth is sharper: Priya Shah is asked for 21 hours against 16 (go/no-go, cutover rehearsal, cutover May 28, and 6 hours of knowledge-transfer prep). Team totals hide individual overloads; check people, not only the bottom line.

4 Demand vs. capacity by period

PERIOD	DATES	DEMAND (H)	CAPACITY (H)	SPARE (H)	UTILIZATION	FLAG	ACTION
Sprints 5 to 6	Apr 12 to May 2	153	192	39	80%	OK	None needed
Sprint 6 end, UAT	May 3 to 23	253	312	59	81%	OK	Book the 2 UAT coordinators by Apr 30
Go/no-go, training, cutover	May 24 to 30	111	112	1	99%	Tight	Smooth Priya Shah (section 5)
Go-live and hypercare	May 31 to Jun 27	201	287	86	70%	OK	Holiday May 31; IT support from Jun 7
Closure	Jun 28 to Jul 9	32	36	4	89%	Tight	Amy Price only; holiday Jul 5
Total		750	939	189	80%	OK	

5 Resolving over-allocation

OVER-ALLOCATION (WHO, WEEK, HOURS OVER)	OPTION CHOSEN AND WHY	EFFECT ON DATES, FLOAT, COST	DECIDED BY · DATE · LOG (T55)
Priya Shah, week of May 24: 21 h assigned, 16 h available (5 over)	Resource smoothing. The 6 hours of knowledge-transfer prep for IT support (T61) are not critical and have float; move them to the week of June 7, before the walkthroughs start	Priya 15 h (Tight) the week of May 24 and 15 h the week of June 7. Go-live June 1 and the critical path do not move. No cost	Amy Price with Priya Shah, April 29, 2027 · logged in T55
Same conflict: options rejected	Leveling (start cutover later) would move go-live; a second IT person has no portal access before cutover	Leveling: go-live slips at least a week and needs a change request (T65)	Not taken

Reading the example: smoothing was enough because the work causing the peak was not on the critical path. Had the overload been cutover itself, smoothing could not help; the choice would be leveling, extra help, or overtime, and anything that moved June 1 would go to Dana Whitfield as a change request.