<PROJECT NAME>

CAPACITY PLANNING

Version *<1.0>*
<mm/dd/yyyy>

[Insert appropriate disclaimer(s)]

VERSION HISTORY

[Provide information on how the development and distribution of the Capacity Plan was controlled and tracked. Use the table below to provide the version number, the author implementing the version, the date of the version, the name of the person approving the version, the date that particular version was approved, and a brief description of the reason for creating the revised version.]

Version #	Implemented By	Revision Date	Approved By	Approval Date	Reason
1.0	*<Author name>*	*<mm/dd/yy>*	*<name>*	*<mm/dd/yy>*	*<reason>*

UP Template Version: 06/30/08

[Insert appropriate disclaimer(s)]

Note to the Author

*[This document is a template of a **Capacity Plan** document for a project. The template includes instructions to the author, boilerplate text, and fields that should be replaced with the values specific to the project.*

- *Blue italicized text enclosed in square brackets ([text]) provides instructions to the document author, or describes the intent, assumptions and context for content included in this document.*

- *Blue italicized text enclosed in angle brackets (<text>) indicates a field that should be replaced with information specific to a particular project.*

- *Text and tables in black are provided as boilerplate examples of wording and formats that may be used or modified as appropriate to a specific project. These are offered only as suggestions to assist in developing project documents; they are not mandatory formats.*

When using this template for your project document, it is recommended that you follow these steps:

1. *Replace all text enclosed in angle brackets (e.g., <Project Name>) with the correct field values. These angle brackets appear in both the body of the document and in headers and footers. To customize fields in Microsoft Word (which display a gray background when selected):*
    a. *Select File>Properties>Summary and fill in the Title field with the Document Name and the Subject field with the Project Name.*
    b. *Select File>Properties>Custom and fill in the Last Modified, Status, and Version fields with the appropriate information for this document.*
    c. *After you click OK to close the dialog box, update the fields throughout the document with these values by selecting Edit>Select All (or Ctrl-A) and pressing F9. Or you can update an individual field by clicking on it and pressing F9. This must be done separately for Headers and Footers.*
2. *Modify boilerplate text as appropriate to the specific project.*
3. *To add any new sections to the document, ensure that the appropriate header and body text styles are maintained. Styles used for the Section Headings are Heading 1, Heading 2 and Heading 3. Style used for boilerplate text is Body Text.*
4. *To update the Table of Contents, right-click and select "Update field" and choose the option- "Update entire table"*
5. *Before submission of the first draft of this document, delete this "Notes to the Author" page and all instructions to the author, which appear throughout the document as blue italicized text enclosed in square brackets.]*

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1 INTRODUCTION

1.1 PURPOSE OF CAPACITY PLAN

[Provide the purpose of the capacity plan. For example: Capacity planning is an important part of infrastructure and deployment planning A capacity plan supports the goal of optimum, and cost effective, provisioning of organizational resources and services by matching them to business demands. It helps identify and reduce inefficiencies associated with either under-utilized resources or unmet customer demand and to provide satisfactory service levels in a cost-efficient manner. The plan helps ensure that all infrastructure components are capable of performing all required functions, that components will perform as efficiently as possible, and accommodate reasonable growth without being overly wasteful.]

The intended audience of the *<Project Name>* Capacity Plan is all project stakeholders including the project sponsor, senior leadership, and the project team.

1.2 SOLUTION REQUIREMENTS

[Include a detailed description of the required solution and links to any supporting documentation.]

1.3 ASSUMPTIONS/CONSTRAINTS

[Include any assumptions and/or constraints.]

2 EXECUTIVE SUMMARY

[Provide an executive summary of the major requirements, findings, plans, costs, etc. outlined within this document.]

3 ANALYSIS OF CAPACITY

[Describe the scenarios analyzed in terms of, business process impact, to understand true capacity requirements. Include consideration for items such as scalability, throughput, availability requirements, storage, resource utilization, security, backups, etc. Describe items such as the strategy for developing these scenarios and a list of the individuals involved.

Describe plans for growth and how they will be addressed and managed. Consider not only the requirements for additional hardware, software, building materials, and space but also where financial funding for these things will come from, additional resource allocation requirements, staffing, training, other expenditures, etc. Expand upon this section by adding/removing additional scenarios if necessary.]

Capacity Type	Current Capacity Analysis	Planned/Expected Growth and Recommendations
[Describe the capacity scenario analyzed. Enter details on current & future capacity requirements.]	*[Describe currently available capacity.]*	*[Describe how future growth expectations have been identified and analyzed. Outline recommendations for managing and addressing*

		this expected growth.]

[Insert appropriate disclaimer(s)]

4 FINDINGS SUMMARY

[If applicable, describe historical capacity growth patterns. Explain how future expected capacity requirements have been identified and analyzed. Outline recommendations for managing and addressing expected growth.]

[Insert a table/illustration, or provide a reference to where it is stored, that shows the different recommendations to address each of the capacity scenarios illustrated above. The example below will vary from project to project.]

[Describe how expected growth will be monitored and managed. Below is a basic example of a table that may be used to illustrate one approach for monitoring and managing future capacity. The approach used to illustrate these requirements may differ from project to project.]

Area/Item Monitored	**Capacity Requirement(s)**	**% Increase Needed Per** *<time period>*	**Capacity Threshold(s)**	**Threshold Response Strategy** (Action to Be Take Upon Reaching Threshold(s))
<Hard Drive Storage>	*<enter capacity requirements and measures>*	*<enter projected increases over intervals of time>*	*<enter acceptable capacity threshold(s)>*	*<enter response strategies to varying threshold limits. Threshold is defined as the level at which an event or change occurs>*
<Meeting Room Tables>				
<Number of Project Staff>				
<Ratio of Quality Assurance Staff to Development Staff>				

Special Comments: *<enter additional comments to help clarify information entered above.>*

[Insert appropriate disclaimer(s)]

5 COST/BUDGET MANAGEMENT

[Insert the cost management plan or provide a reference to where it is stored.]

6 COMPLIANCE RELATED PLANNING

[Insert a list of compliance related processes the implementation must adhere to. For assistance with determining which compliance processes need to be followed visit http://www2.cdc.gov/cdcup/document_library/project_assessment.asp]

Appendix A: Capacity Plan Approval

The undersigned acknowledge they have reviewed the *<Project Name>* **Capacity Plan** and agree with the approach it presents. Changes to this **Capacity Plan** will be coordinated with and approved by the undersigned or their designated representatives.

[List the individuals whose signatures are desired. Examples of such individuals are Business Steward, Implementation Manager or Project Sponsor. Add additional lines for signature as necessary. Although signatures are desired, they are not always required to move forward with the practices outlined within this document.]

Signature: _____ Date: _____

Print Name: _____

Title: _____

Role: _____

Signature: _____ Date: _____

Print Name: _____

Title: _____

Role: _____

Signature: _____ Date: _____

Print Name: _____

Title: _____

Role: _____

APPENDIX B: REFERENCES

[Insert the name, version number, description, and physical location of any documents referenced in this document. Add rows to the table as necessary.]

The following table summarizes the documents referenced in this document.

Document Name and Version	Description	Location
<Document Name and Version Number>	*[Provide description of the document]*	*<URL or Network path where document is located>*

APPENDIX C: KEY TERMS

[Insert terms and definitions used in this document. Add rows to the table as necessary. Follow the link below to for definitions of project management terms and acronyms used in this and other documents.

http://www2.cdc.gov/cdcup/library/other/help.htm

The following table provides definitions for terms relevant to this document.

Term	Definition
[Insert Term]	*[Provide definition of the term used in this document.]*
[Insert Term]	*[Provide definition of the term used in this document.]*
[Insert Term]	*[Provide definition of the term used in this document.]*