

FORM 26(F)
REPORT OF PARTIES' PLANNING MEETING

CAPTION OF CASE

[LIST ALL PARTIES]

DATE COMPLAINT FILED:

DATE COMPLAINT SERVED:

DATE OF DEFENDANT'S APPEARANCE:

PURSUANT TO FED. R. CIV. P. 16(B), 26(F) AND D. CONN. L. CIV. R. 38, A CONFERENCE WAS HELD ON [DATE]. THE PARTICIPANTS WERE:

_____ FOR PLAINTIFF [PARTY NAME]

_____ FOR DEFENDANT [PARTY NAME]

I. CERTIFICATION

UNDERSIGNED COUNSEL CERTIFY THAT, AFTER CONSULTATION WITH THEIR CLIENTS, THEY HAVE DISCUSSED THE NATURE AND BASIS OF THE PARTIES' CLAIMS AND DEFENSES AND ANY POSSIBILITIES FOR ACHIEVING A PROMPT SETTLEMENT OR OTHER RESOLUTION OF THE CASE AND, IN CONSULTATION WITH THEIR CLIENTS, HAVE DEVELOPED THE FOLLOWING PROPOSED CASE MANAGEMENT PLAN. COUNSEL FURTHER CERTIFY THAT THEY HAVE FORWARDED A COPY OF THIS REPORT TO THEIR CLIENTS.

II. JURISDICTION

A. SUBJECT MATTER JURISDICTION

B. PERSONAL JURISDICTION

III. BRIEF DESCRIPTION OF CASE

A. CLAIMS OF PLAINTIFF(S):

B. DEFENSES AND CLAIMS (COUNTERCLAIMS, THIRD PARTY CLAIMS, CROSS CLAIMS) OF DEFENDANT(S):

C. DEFENSES AND CLAIMS OF THIRD PARTY DEFENDANT(S):

IV. STATEMENT OF UNDISPUTED FACTS

COUNSEL CERTIFY THAT THEY HAVE MADE A GOOD FAITH ATTEMPT TO DETERMINE WHETHER THERE ARE ANY MATERIAL FACTS THAT ARE NOT IN DISPUTE. THE PARTIES STATE THAT THE FOLLOWING MATERIAL FACTS ARE UNDISPUTED:

V. CASE MANAGEMENT PLAN

A. STANDING ORDER ON SCHEDULING IN CIVIL CASES

THE PARTIES [REQUEST] [DO NOT REQUEST] MODIFICATION OF THE DEADLINES IN THE STANDING ORDER ON SCHEDULING IN CIVIL CASES [AS FOLLOWS]:

B. SCHEDULING CONFERENCE WITH THE COURT

THE PARTIES [REQUEST] [DO NOT REQUEST] A PRETRIAL CONFERENCE WITH THE COURT BEFORE ENTRY OF A SCHEDULING ORDER PURSUANT TO FED. R. CIV. P. 16(B). THE PARTIES PREFER A CONFERENCE [IN PERSON] [BY TELEPHONE].

C. EARLY SETTLEMENT CONFERENCE

1. THE PARTIES CERTIFY THAT THEY HAVE CONSIDERED THE DESIRABILITY OF ATTEMPTING TO SETTLE THE CASE BEFORE UNDERTAKING SIGNIFICANT DISCOVERY OR MOTION PRACTICE. SETTLEMENT [IS LIKELY] [IS UNLIKELY AT THIS TIME] [MAY BE ENHANCED BY USE OF THE FOLLOWING PROCEDURE]: _____.

2. THE PARTIES [REQUEST] [DO NOT REQUEST] AN EARLY SETTLEMENT CONFERENCE.

3. THE PARTIES PREFER A SETTLEMENT CONFERENCE WITH [THE PRESIDING JUDGE] [A MAGISTRATE JUDGE] [A PARAJUDICIAL OFFICER] [SPECIAL MASTERS].

4. THE PARTIES [REQUEST] [DO NOT REQUEST] A REFERRAL FOR ALTERNATIVE DISPUTE RESOLUTION PURSUANT TO D. CONN. L. CIV. R. 36.

D. JOINDER OF PARTIES AND AMENDMENT OF PLEADINGS

1. PLAINTIFF(S) SHOULD BE ALLOWED UNTIL [DATE] TO FILE MOTIONS TO JOIN ADDITIONAL PARTIES AND UNTIL [DATE] TO FILE MOTIONS TO AMEND THE PLEADINGS.

2. DEFENDANT(S) SHOULD BE ALLOWED UNTIL [DATE] TO FILE MOTIONS TO JOIN ADDITIONAL PARTIES AND UNTIL [DATE] TO FILE A RESPONSE TO THE COMPLAINT.

E. DISCOVERY

1. THE PARTIES ANTICIPATE THAT DISCOVERY WILL BE NEEDED ON THE FOLLOWING SUBJECTS: [LIST EACH OF THE PRINCIPAL ISSUES OF FACT ON WHICH DISCOVERY WILL BE NEEDED; A STATEMENT THAT "DISCOVERY WILL BE NEEDED ON LIABILITY AND DAMAGES" IS INSUFFICIENT].

2. ALL DISCOVERY, INCLUDING DEPOSITIONS OF EXPERT WITNESSES PURSUANT TO FED. R. CIV. P. 26(B)(4), WILL BE COMMENCED BY [DATE] AND COMPLETED (NOT PROPOUNDED) BY [DATE].

3. DISCOVERY [WILL] [WILL NOT] BE CONDUCTED IN PHASES.

4. DISCOVERY ON [ISSUES FOR EARLY DISCOVERY] WILL BE COMPLETED BY [DATE].

5. THE PARTIES ANTICIPATE THAT THE PLAINTIFF(S) WILL REQUIRE A TOTAL OF _____ DEPOSITIONS OF FACT WITNESSES AND THAT THE DEFENDANT(S) WILL REQUIRE A TOTAL OF _____ DEPOSITIONS OF FACT WITNESSES. THE DEPOSITIONS WILL COMMENCE BY [DATE] AND BE COMPLETED BY [DATE].

6. THE PARTIES [WILL] [WILL NOT] REQUEST PERMISSION TO SERVE MORE THAN TWENTY-FIVE (25) INTERROGATORIES.

7. PLAINTIFF(S) [INTEND] [DO NOT INTEND] TO CALL EXPERT WITNESSES AT TRIAL. PLAINTIFF(S) WILL DESIGNATE ALL TRIAL EXPERTS AND PROVIDE OPPOSING COUNSEL WITH REPORTS FROM RETAINED EXPERTS PURSUANT TO FED. R. CIV. P. 26(A)(2) BY [A DATE NOT LATER THAN THREE (3) MONTHS BEFORE THE DEADLINE FOR COMPLETING ALL DISCOVERY]. DEPOSITIONS OF ANY SUCH EXPERTS WILL BE COMPLETED BY [A DATE NOT LATER THAN TWO (2) MONTHS BEFORE THE DEADLINE FOR COMPLETING ALL DISCOVERY].

8. DEFENDANT(S) [INTEND] [DO NOT INTEND] TO CALL EXPERT WITNESSES AT TRIAL. DEFENDANT(S) WILL DESIGNATE ALL TRIAL EXPERTS AND PROVIDE OPPOSING COUNSEL WITH REPORTS FROM RETAINED EXPERTS PURSUANT TO FED. R. CIV. P. 26(A)(2) BY [A DATE NOT LATER THAN ONE (1) MONTH BEFORE THE DEADLINE FOR COMPLETING ALL DISCOVERY]. DEPOSITIONS OF SUCH EXPERTS WILL BE COMPLETED BY [A DATE NOT LATER THAN THE DISCOVERY CUTOFF DATE].

9. A DAMAGES ANALYSIS WILL BE PROVIDED BY ANY PARTY WHO HAS A CLAIM OR COUNTERCLAIM FOR DAMAGES BY [DATE].

F. DISPOSITIVE MOTIONS

DISPOSITIVE MOTIONS WILL BE FILED ON OR BEFORE [DATE].

G. JOINT TRIAL MEMORANDUM

THE JOINT TRIAL MEMORANDUM REQUIRED BY THE STANDING ORDER ON TRIAL MEMORANDA IN CIVIL CASES WILL BE FILED BY [DATE].

VI. TRIAL READINESS

THE CASE WILL BE READY FOR TRIAL BY [DATE].

AS OFFICERS OF THE COURT, UNDERSIGNED COUNSEL AGREE TO COOPERATE WITH EACH OTHER AND THE COURT TO PROMOTE THE JUST, SPEEDY AND INEXPENSIVE DETERMINATION OF THIS ACTION.

PLAINTIFF

BY _____ DATE:

DEFENDANT

BY _____ DATE:

THE UNDERSIGNED *PRO SE* PARTIES CERTIFY THAT THEY WILL COOPERATE WITH ALL OTHER PARTIES, COUNSEL OF RECORD AND THE COURT TO PROMOTE THE JUST, SPEEDY AND INEXPENSIVE DETERMINATION OF THIS ACTION.

PLAINTIFF _____ DATE:

DEFENDANT _____ DATE: