

**UNITED STATES DISTRICT COURT  
SOUTHERN DISTRICT OF TEXAS  
LAREDO DIVISION**

<b>Plaintiff,</b>	§	
	§	
	§	
	§	<b>CIVIL ACTION NO. 5: __-CV- ____</b>
<b>vs.</b>	§	
	§	
	§	
	§	
	§	
<b>Defendant.</b>	§	

**JOINT REPORT REQUIRED BY FED. R. CIV. P. 26(f)  
AND JOINT DISCOVERY/CASE MANAGEMENT PLAN**

Please restate each instruction in **bold** before furnishing the requested information.

Any differences between parties as to the response(s) to any matter must be set forth in this report.

Preliminary Matters

1. State when and in what manner the parties conferred as required by Rule 26(f), and identify the counsel and/or parties who participated in the conference.
2. List cases pending in this, or any other district, with their cause number and judicial district, which are related to this case.
3. If any cases pending in this or another district, can and should this case be consolidated with those cases?
4. Briefly describe what this case is about.
5. What is the Plaintiff's allegation of federal jurisdiction?
6. Does/do the Defendant(s) agree or disagree with this allegation?
7. Does either party anticipate the need to add additional parties?
8. If so, list any additional parties and when they can be added.
9. List any anticipated interventions.

10. Is/are there any issues in this case which may raise class allegations or class action issues?

### Discovery

11. The conference required by Rule 26(f) was held on \_\_\_\_\_, at \_\_\_\_\_.  
Counsel and/or parties who participated in the conference are:  
\_\_\_\_\_ for Plaintiff(s) \_\_\_\_\_.  
\_\_\_\_\_ for Defendant(s) \_\_\_\_\_.
12. Describe the proposed discovery plan agreed upon at the conference. Include the following:
- a) What changes should be made in the timing, form or requirement for disclosures under Rule 26(a).
  - b) When and to whom the plaintiff anticipates it may send interrogatories.
  - c) When and to whom the defendant anticipates it may send interrogatories.
  - d) Of whom and by what date the plaintiff anticipates taking oral depositions.
  - e) Of whom and by what date the defendant anticipates taking oral depositions.
  - f) When the plaintiff (or the party with the burden of proof on an issue) will be able to designate experts and provide the reports required by Rule 26(a)(2)(B), and when the opposing party will be able to designate responsive experts and provide their reports.
  - g) List expert depositions the plaintiff (or the party with the burden of proof on an issue) anticipates taking and their anticipated completion date. *See* Rule 26(a)(2)(B) (expert report).
  - h) List expert depositions the opposing party anticipates taking and their anticipated completion date. *See* Rule 26(a)(2)(B) (expert report).
13. If the parties do not agree on any portion of the discovery plan, describe the separate views and proposals of each party.
14. Specify the discovery beyond initial disclosures that has been undertaken to date.
15. State the date the planned discovery can reasonably be completed.

### Settlement and Trial Alternatives

16. Describe the possibilities of settlement or alternative dispute resolution which were discussed at the Rule 26(f) meeting.
17. Describe what each party has done or agreed to do to bring about a prompt resolution.

18. From the attorneys' discussion with the client, state the alternative dispute resolution techniques that are reasonably suitable, and state when such a technique may be effectively used in this case.
19. Magistrate judges may now hear jury and non-jury trials. Will the parties consent to trial before a Magistrate Judge?
20. State whether a jury demand has been made and if it was made on time.
21. In the event of a trial, how many **hours** will it take to try this case?

Additional Conference Items

22. If there are any motions pending before the Court at this time, list them.
23. Can any of these motions be ruled upon at the initial pretrial and scheduling conference?
24. Are there any other matters peculiar to this case, including discovery, which deserve the special attention of the Court at the conference?
25. **Proposed Dates for Scheduling.** Please review the proposed deadlines for many of the pretrial events (listed below) that will be scheduled for this case. Both the events and the proposed dates are intended to give the parties guidance in (1) formulating answers to the other parts of this questionnaire and (2) scheduling the events preceding the trial. The Scheduling Order that will be entered at the Scheduling Conference will necessarily be more specific, more detailed, and contain additional matters and discovery limitations. The court's suggested dates and events may be appropriate for this case. If not, please propose suggested modifications that the parties believe are suited for this lawsuit. As indicated below by asterisks, some dates and events are "inflexible" because of limited judicial resources and the court's calendar.

PRETRIAL EVENTS	COURT'S PROPOSED DATES	PARTIES' PROPOSED DATES
<b>Rule 26(f) meeting*</b>		
<b>File case management plan*</b>		
<b>Rule 16(b) scheduling conf.*</b>		

<b>Rule 26(a)(1) initial disclosures*</b>		
<b>Deadline for joinder of all parties</b>		
<b>Deadline for plaintiff to designate expert witnesses and provide reports</b>		
<b>Deadline for defendant to designate expert witnesses and provide reports</b>		
<b>Discovery deadline</b>		
<b>Deadline to complete ADR</b>		
<b>Deadline to amend pleadings (with parties consent or leave of Court)</b>		
<b>Deadline to file contested motions*</b>		
<b>Deadline to file joint pretrial order, motions in limine &amp; proposed jury instructions (or proposed findings of fact &amp; conclusions of law)</b>		
<b>Pretrial conference &amp; trial scheduling*</b>		

26. List the names, bar numbers, addresses, and telephone numbers of all counsel.