

Counsel Submitting and Utah State Bar Number  
Attorneys for  
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IN THE UNITED STATES DISTRICT COURT  
FOR THE DISTRICT OF UTAH

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_____, Plaintiff,  v.  _____, Defendant.	<b>ATTORNEY PLANNING MEETING REPORT</b>  Case No. _____  District Judge _____
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**1. PRELIMINARY MATTERS:**

- a. Describe the nature of the claims and affirmative defenses:
- b. This case is \_\_\_\_\_ not referred to a magistrate judge  
\_\_\_\_\_ referred to magistrate judge \_\_\_\_\_  
\_\_\_\_\_ under 636(b)(1)(A)  
\_\_\_\_\_ under 636(b)(1)(B)  
\_\_\_\_\_ assigned to a magistrate judge under General Order 07-001  
and  
\_\_\_\_\_ all parties consent to the assignment for all  
proceedings or  
\_\_\_\_\_ one or more parties request reassignment to a district  
judge
- c. Pursuant to Fed. R. Civ. P. 26(f), a meeting was held on \_\_\_\_\_ (*specify date*)  
at \_\_\_\_\_ (*specify location*).

The following attended:

\_\_\_\_\_ *name of attorney*,  
counsel for \_\_\_\_\_ *name of party*

\_\_\_\_\_ name of attorney,  
counsel for \_\_\_\_\_ name of party

- d. The parties \_\_\_\_\_ have exchanged or \_\_\_\_\_ will exchange by \_\_\_/\_\_\_/\_\_\_ the initial disclosures required by Rule 26(a)(1).
- e. Pursuant to Fed. R. Civ. P. 5(b)(2)(D), the parties agree to receive all items required to be served under Fed. R. Civ. P. 5(a) by either (i) notice of electronic filing, or (ii) email transmission. Such electronic service will constitute service and notice of entry as required by those rules. Any right to service by USPS mail is waived.

**2. DISCOVERY PLAN:** The parties jointly propose to the court the following discovery plan: *Use separate paragraphs or subparagraphs as necessary if the parties disagree.*

- a. Discovery is necessary on the following subjects: *Briefly describe the subject areas in which discovery will be needed.*
- b. Discovery Phases  
*Specify whether discovery will (i) be conducted in phases, or (ii) be limited to or focused on particular issues. If (ii), specify those issues and whether discovery will be accelerated with regard to any of them and the date(s) on which such early discovery will be completed.*
- c. Designate the discovery methods to be used and the limitations to be imposed.
  - (1) *For oral exam depositions, (i) specify the maximum number for the plaintiff(s) and the defendant(s), and (ii) indicate the maximum number of hours unless extended by agreement of the parties.*

Oral Exam Depositions

Plaintiff(s) \_\_\_\_\_

Defendant(s) \_\_\_\_\_

Maximum number of hours per deposition \_\_\_\_\_

- (2) *For interrogatories, requests for admissions, and requests for production of documents, specify the maximum number that will be served on any party by any other party.*

Interrogatories \_\_\_\_\_

Admissions \_\_\_\_\_

Requests for production of documents \_\_\_\_\_

- (3) *Other discovery methods: Specify any other methods that will be used and any limitations to which all parties agree.*

- d. Discovery of electronically stored information should be handled as follows: *Brief description of parties' agreement.*
- e. The parties have agreed to an order regarding claims of privilege or protection as trial preparation material asserted after production, as follows: *Brief description of provisions of proposed order.*
- f. Last day to file written discovery \_\_\_/\_\_\_/\_\_\_
- g. Close of fact discovery \_\_\_/\_\_\_/\_\_\_
- h. (optional) Final date for supplementation of disclosures under Rule 26(a)(3) and of discovery under Rule 26(e) \_\_\_/\_\_\_/\_\_\_

**3. AMENDMENT OF PLEADINGS AND ADDITION OF PARTIES:**

- a. The cutoff dates for filing a motion to amend pleadings are: *specify date*  
Plaintiff(s) \_\_\_/\_\_\_/\_\_\_ Defendant(s) \_\_\_/\_\_\_/\_\_\_
- b. The cutoff dates for filing a motion to join additional parties are: *specify date*  
Plaintiff(s) \_\_\_/\_\_\_/\_\_\_ Defendants(s) \_\_\_/\_\_\_/\_\_\_

*(NOTE: Establishing cutoff dates for filing motions does not relieve counsel from the requirements of Fed. R. Civ. P. 15(a)).*

**4. EXPERT REPORTS:**

- a. The parties will disclose the subject matter and identity of their experts on (specify dates):  
Party(ies) bearing burden of proof \_\_\_/\_\_\_/\_\_\_  
Counter Disclosures \_\_\_/\_\_\_/\_\_\_
- b. Reports from experts under Rule 26(a)(2) will be submitted on (specify dates):  
Party(ies) bearing burden of proof \_\_\_/\_\_\_/\_\_\_  
Counter Reports \_\_\_/\_\_\_/\_\_\_

**5. OTHER DEADLINES:**

- a. Expert Discovery cutoff: \_\_\_/\_\_\_/\_\_\_
- b. Deadline for filing dispositive<sup>1</sup> or potentially dispositive motions including motions to exclude experts where expert testimony is required to prove the case.  
\_\_\_/\_\_\_/\_\_\_
- c. Deadline for filing partial or complete motions to exclude expert testimony  
\_\_\_/\_\_\_/\_\_\_

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<sup>1</sup> Dispositive motions, if granted, resolve a claim or defense in the case; nondispositive motions, if granted, affect the case but do not resolve a claim or defense.

**6. ADR/SETTLEMENT:**

*Use separate paragraphs/subparagraphs as necessary if the parties disagree.*

- a. The potential for resolution before trial is: \_\_\_ good \_\_\_ fair \_\_\_ poor
- b. The parties intend to file a motion to participate in the Court’s alternative dispute resolution program for: settlement conference (with magistrate judge): \_\_\_\_\_ arbitration: \_\_\_\_\_ mediation: \_\_\_\_\_
- c. The parties intend to engage in private alternative dispute resolution for: arbitration: \_\_\_\_\_ mediation: \_\_\_\_\_
- d. The parties will re-evaluate the case for settlement/ADR resolution on (*specify date*): \_\_\_/\_\_\_/\_\_\_

**7. TRIAL AND PREPARATION FOR TRIAL:**

- a. The parties should have \_\_\_\_\_ days after service of final lists of witnesses and exhibits to list objections under Rule 26(a)(3) (if different than the 14 days provided by Rule).
- b. This case should be ready for trial by: *specify date* \_\_\_/\_\_\_/\_\_\_  
*Specify type of trial:* Jury \_\_\_\_\_ Bench \_\_\_\_\_
- c. The estimated length of the trial is: *specify days* \_\_\_\_\_

\_\_\_\_\_  
Signature and typed name of Plaintiff(s) Attorney

Date: \_\_\_/\_\_\_/\_\_\_

\_\_\_\_\_  
Signature and typed name of Defendant(s) Attorney

Date: \_\_\_/\_\_\_/\_\_\_

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**NOTICE TO COUNSEL**

Instructions to file the Attorney Planning Meeting Report can be found on the court’s [Civil Scheduling](#) webpage.