

THE UNITED STATES DISTRICT COURT  
FOR THE SOUTHERN DISTRICT OF OHIO  
EASTERN DIVISION

Plaintiff(s)	:	Case No. _____
vs.	:	District Judge: _____
Defendant(s)	:	Magistrate Judge: _____
	:	RULE 26(f) REPORT OF PARTIES
	:	(to be filed no fewer than seven (7)
	:	days prior to the Rule 16 Conference)
	:	

1. Pursuant to F.R. Civ.P. 26(f), a meeting was held on \_\_\_\_\_ and was attended by:

\_\_\_\_\_, counsel for plaintiff(s) \_\_\_\_\_

\_\_\_\_\_, counsel for plaintiff(s) \_\_\_\_\_

\_\_\_\_\_, counsel for defendant(s) \_\_\_\_\_

\_\_\_\_\_, counsel for defendant(s) \_\_\_\_\_

2. **Consent to Magistrate Judge.** The parties:

\_\_\_ unanimously consent to the jurisdiction of the United States Magistrate Judge pursuant to 28 U.S.C. 636 (c).

\_\_\_ do not unanimously consent to the jurisdiction of the United States Magistrate Judge pursuant to 28 U.S.C. 636 (c).

3. **Initial Disclosures.** The parties:

\_\_\_ have exchanged the initial disclosures required by Rule 26(a)(1);

\_\_\_ will exchange such disclosures by \_\_\_\_\_

\_\_\_ are exempt from such disclosures under Rule 26(a)(1)(E).

\_\_\_ have agreed not to make initial disclosures.

4. **Jurisdiction and Venue**

a. Describe any contested issues relating to: (1) subject matter jurisdiction, (2) personal jurisdiction and/or (3) venue:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

b. Describe the discovery, if any, that will be necessary to the resolution of issues relating to jurisdiction and venue:

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c. Recommended date for filing motions addressing jurisdiction and/or venue:

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5. **Amendments to Pleading and/or Joinder of Parties**

a. Recommended date for filing motion/stipulation to amend the pleadings or to add additional parties: \_\_\_\_\_

b. If class action, recommended date for filing motion to certify the class: \_\_\_\_\_

6. **Recommended Discovery Plan**

a. Describe the **subjects** on which discovery is to be sought and the nature and extent of discovery that each party will need:

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b. What **changes** should be made, if any, in the limitations on discovery imposed by the Federal Rules of Civil Procedure or the local rules of this Court?

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c. The case presents the following issues relating to disclosure or discovery of **electronically stored information**, including the form or forms in which it should be produced:

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d. The case presents the following issues relating to claims of **privilege or of protection as trial preparation materials**:

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i. Have the parties agreed on a procedure to assert such claims **AFTER** production?

\_\_\_ No

\_\_\_ Yes

\_\_\_ Yes, and the parties ask that the Court include their agreement in an Order.

e. Identify the discovery, if any, that can be **deferred** pending settlement discussion and/or resolution of potentially dispositive motions:

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f. The parties recommend that discovery should proceed in **phases**, as follows:

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g. Describe the areas in which **expert testimony** is expected and indicate whether each expert will be specially retained within the meaning of F.R.Civ.P.26(a)(2):

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i. Recommended date for making **primary expert designations**:

\_\_\_\_\_

ii. Recommended date for making **rebuttal expert designations**:

\_\_\_\_\_

h. Recommended discovery **completion date**: \_\_\_\_\_

7. **Dispositive Motion(s)**

a. Recommended date for filing dispositive motions: \_\_\_\_\_

8. **Settlement Discussions**

a. Has a settlement demand been made? \_\_\_\_\_ A response? \_\_\_\_\_

b. Date by which a settlement demand can be made: \_\_\_\_\_

c. Date by which a response can be made: \_\_\_\_\_

9. **Settlement Week Referral**

The earliest Settlement Week referral reasonably likely to be productive is the

\_\_\_\_ March 20\_\_\_\_ Settlement Week

\_\_\_\_ June 20\_\_\_\_ Settlement Week

\_\_\_\_ September 20\_\_\_\_ Settlement Week

\_\_\_\_ December 20\_\_\_\_ Settlement Week

10. **Other matters for the attention of the Court:**

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**Signatures:**

Attorney(s) for Plaintiff(s):

\_\_\_\_\_  
Ohio Bar# \_\_\_\_\_  
Trial Attorney for \_\_\_\_\_

\_\_\_\_\_  
Ohio Bar# \_\_\_\_\_  
Trial Attorney for \_\_\_\_\_

\_\_\_\_\_  
Ohio Bar# \_\_\_\_\_  
Trial Attorney for \_\_\_\_\_

\_\_\_\_\_  
Ohio Bar# \_\_\_\_\_  
Trial Attorney for \_\_\_\_\_

Attorney(s) for Defendant(s):

\_\_\_\_\_  
Ohio Bar# \_\_\_\_\_  
Trial Attorney for \_\_\_\_\_

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Ohio Bar# \_\_\_\_\_  
Trial Attorney for \_\_\_\_\_

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Ohio Bar# \_\_\_\_\_  
Trial Attorney for \_\_\_\_\_

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Ohio Bar# \_\_\_\_\_  
Trial Attorney for \_\_\_\_\_