

UNITED STATES DISTRICT COURT
SOUTHERN DISTRICT OF NEW YORK

No. __ -cv- ____ () (SDA)

Plaintiff(s),

-against-

Defendant(s).

REPORT OF RULE 26(f) MEETING AND PROPOSED CASE MANAGEMENT PLAN

In accordance with Federal Rule of Civil Procedure 26(f), counsel for the parties spoke on _____ and exchanged communications thereafter, and submit the following report of their meeting for the court's consideration:

1. Summary of Claims, Defenses and Relevant Issues:

Plaintiff:

Defendant:

2. Basis of Subject Matter Jurisdiction: _____

3. Subjects on Which Discovery May Be Needed:

Plaintiff:

Defendant:

4. Initial Disclosures:

The information required by Rule 26(a)(1) of the Federal Rules of Civil Procedure was disclosed by Plaintiff(s) on _____. In addition, on _____, Plaintiff(s) produced/will produce an initial set of relevant documents identified in its Initial Disclosures and will continue to supplement its production.

The information required by Rule 26(a)(1) of the Federal Rules of Civil Procedure was disclosed by Defendant(s) on _____. In addition, on _____, Defendant(s) produced/will produce an initial set of relevant documents identified in its Initial Disclosures and will continue to supplement its production.

5. Formal Discovery:

The parties jointly propose to the Court the following discovery plan:

- a. All fact discovery must be completed by _____.
- b. The parties are to conduct discovery in accordance with the Federal Rules of Civil Procedure and the Local Rules of the Southern District of New York. The following interim deadlines may be extended by the parties on consent without application to the Court, provided that the parties meet the deadline for completing fact discovery set forth in 5(a) above.

- i. Depositions: Depositions shall be completed by _____ and limited to no more than _____ depositions per party. Absent an agreement between the parties or an order from the Court, non-party depositions shall follow initial party depositions.
- ii. Interrogatories: Initial sets of interrogatories shall be served on or before _____. All subsequent interrogatories must be served no later than 30 days from the discovery deadline.
- iii. Requests for Admission: Requests for admission must be served on or before _____.
- iv. Requests for Production: Initial requests for production were/will be exchanged on _____, and responses shall be due on _____. All subsequent requests for production must be served no later than 30 days before the discovery deadline.
- v. Supplementation: Supplementations under Rule 26(e) must be made within a reasonable period of time after discovery of such information.

6. Anticipated Discovery Disputes:

Are there any anticipated discovery disputes? Does either party seek limitations on discovery? Describe.

7. Amendments to Pleadings:

- a. No amended pleadings may be filed after _____. Any motion to amend after this date will need to meet the good cause requirements of Federal Rule of Civil Procedure 16(b).
- b. No additional parties may be joined after _____. Any motion to join after this date will need to meet the good cause requirements of Federal Rule of Civil Procedure 16(b).

8. Expert Witness Disclosures:

At this time, the parties do/do not (circle one) anticipate utilizing experts. Expert discovery shall be completed by _____.

9. Electronic Discovery and Preservation of Documents and Information:

a. Have the parties discussed electronic discovery? _____

b. Is there an electronic discovery protocol in place? If not, when the parties expect to have one in place? _____

c. Do the parties want the Court to enter a Rule 502(d) Order? (see [Rule 502\(d\) Order](#))

Yes _____ No _____

d. Will parties enter into a Protective Order (see [Model Protective Order](#))?

Yes _____ No _____

If yes, the Protective Order shall be submitted no later than _____.

e. Are there issues the parties would like to address concerning preservation of evidence and/or electronic discovery at the Initial Case Management Conference?

10. Anticipated Motions:

11. Early Settlement or Resolution:

The parties have/have not (circle one) discussed the possibility of settlement. The parties request a settlement conference by no later than _____. The following information is needed before settlement can be discussed:

12. Trial:

- a. The parties anticipate that this case will be ready for trial by _____.
- b. The parties anticipate that the trial of this case will require _____ days.
- c. The parties do/do not (circle one) consent to a trial before a Magistrate Judge at this time.
- d. The parties request a jury/bench (circle one) trial.

13. Status Letter:

The parties shall file a joint letter regarding the status of discovery on _____ (date to be determined by the Court).

14. Other Matters:

Respectfully submitted this ____ day of _____

ATTORNEY(S) FOR PLAINTIFF(S):

ATTORNEY(S) FOR DEFENDANT(S):
