

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

| | | |
|---------------|---|------------------|
| Plaintiff(s), | § | |
| | § | |
| v. | § | Civil Action No. |
| | § | |
| Defendant(s). | § | |
| | § | |
| | § | |

JOINT DISCOVERY/CASE MANAGEMENT PLAN
Under Rule 26(f) of the Federal Rules of Civil Procedure

*(Please **restate** the instruction in **bold** before burnishing the responsive information.)*

1. State where and when the conference among the parties required by Rule 26(f) and identify the counsel who attended for each party.
2. List the cases related to this one that are pending in any state or federal court with the case number and court.
3. Specify the allegation of federal jurisdiction.
4. Name the parties who disagree with the plaintiff's jurisdictional allegations and state their reasons.
5. List anticipated additional parties when they can be added, if any.
6. List anticipated interventions, if any.
7. Describe class-action issues, if any.
8. State whether each party has completed the initial disclosures required by Rule 26(a). If not, describe the arrangements to complete the disclosures.
9. Describe the proposed agreed discovery plan, including:
 - a. Responses to all the matters raised in Rule 26(f).
 - 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 when the plaintiff anticipates taking oral depositions.

- e. Of whom and by when 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 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 complete date. *See* Rule 26(a)(2)(B) (expert report).
10. If the parties cannot agree on a part of the discovery plan, describe the separate views and proposals of each party.
 11. Specify the discovery beyond initial disclosures that has been undertaken.
 12. State the date the planned discovery can reasonably be completed.
 13. Describe the possibilities for a prompt settlement or resolution of the case that were discussed in your Rule 26(f) meeting.
 14. Describe what each party has done or agreed to do to bring about a prompt resolution.
 15. From the attorneys' discussion with their client(s), state the alternative dispute resolution techniques that are reasonably suitable and state when such a technique may be effectively used in this case.
 16. Magistrate judges may now hear jury and non-jury trials. Indicate the parties' joint position on a trial before a magistrate judge.
 17. State whether a jury demand has been made and if it was made on time.
 18. Specify the number of hours it will take to present the evidence in this case.
 19. List pending motions that could be ruled on at the initial pretrial and scheduling conference.
 20. List other pending motions.
 21. Convey other matters peculiar to this case, including discovery, that deserve the special attention of the court at the conference.

- 22. List and summarize all issues pending in the case. Include a statement that counsel have met and agreed on the summation list of issues.
- 23. List the names, bar numbers, addresses, and telephone numbers of all counsel.

Counsel for Plaintiff(s):

Name: _____

Bar Number: _____

Address: _____

Telephone: _____ Date: _____

Counsel for Defendants(s):

Name: _____

Bar Number: _____

Address: _____

Telephone: _____ Date: _____

Approved:

Attorney-in-Charge, Plaintiff(s)

Date

Attorney-in-Charge, Defendant(s)

Date