

**IN THE UNITED STATES DISTRICT COURT
FOR THE SOUTHERN DISTRICT OF TEXAS
HOUSTON DIVISION**

<i>Plaintiff(s),</i>	§	
	§	
v.	§	Civil Action H-_____
	§	
<i>Defendant(s).</i>	§	
	§	

JOINT DISCOVERY/CASE MANAGEMENT PLAN
UNDER RULE 26(f) OF FEDERAL RULES OF CIVIL PROCEDURE
*(Please **restate** the instruction in **bold** before furnishing the responsive information.)*

1. State where and when the conference among the parties required by Rule 26(f) of the Federal Rules of Civil Procedure was held, and identify the counsel who attended for each party, including name, address, bar number, phone and fax numbers, and email addresses.
2. List the cases related to this one that are pending in any state or federal court with the case number and court, and state how they are related.
3. Briefly describe what this case is about.
4. Specify the allegation of federal jurisdiction.
5. Name the parties who disagree with the plaintiff's jurisdictional allegations and state their reasons.
6. List anticipated additional parties that should be included, when they can be added, and by whom they are wanted.
7. List anticipated interventions.
8. Describe class-action issues.
9. State whether each party represents that it has made the initial disclosures required by Rule 26(a). If not, describe the arrangements that have been made to complete the disclosures.
10. Describe the proposed agreed discovery plan, including:
 - a. The parties' plan for discovery needed to obtain nonprivileged information that is relevant and proportional to the needs of the case. The parties are expected to engage in early, ongoing, and meaningful planning for proportional discovery in accordance with Federal Rule of Civil Procedure 26(b)(1).

- b. Whether discovery can initially be focused or targeted to obtain the information relevant to the most important issues and available from the most easily accessible sources.
 - c. Whether there are steps that could reduce or avoid discovery costs.
 - d. Whether there are issues specifically relating to the disclosure or discovery of electronically stored information, including:
 - (i) the form or forms in which it should be produced;
 - (ii) the topics and period for which discovery will be sought;
 - (iii) the sources of information or systems within a party's control that should be searched;
 - (iv) issues relating to preserving, retrieving, reviewing, disclosing, or producing electronically stored information; and
 - (v) issues relating to claims of privilege protection including—if the parties agree on a procedure to assert claims after production—whether to ask the court to include their agreement in an order under Federal Rule of Evidence 502(d) or, if no agreement is reached, whether the court should nonetheless enter the order.
 - e. When and to whom each party anticipates it may send interrogatories.
 - f. Of whom and by when each party anticipates taking oral depositions.
 - g. The dates experts for each party will be designated and their reports provided to the opposing party (Rule 26(a)(2)(B)).
11. If the parties are not agreed on a part of the discovery plan, describe the separate views and proposals of each party.
 12. Specify the discovery beyond initial disclosures that has been undertaken to date.
 13. State the date the planned discovery can reasonably be completed.
 14. Describe the possibilities for a prompt settlement or resolution of the case that were discussed in your Rule 26(f) meeting.
 15. Describe what each party has done or agreed to do to bring about a prompt resolution.
 16. From the attorneys' discussion with their client(s), state the alternative dispute resolution techniques that are reasonably suitable.

17. Magistrate judges may hear jury and non-jury trials. Indicate the parties' joint position on a trial before a magistrate judge.
18. State whether a jury demand has been made and if it was made on time.
19. Specify the number of hours it will take to present the evidence in this case.
20. List pending motions.
21. Indicate other matters peculiar to this case, including discovery, that deserve the special attention of the court.
22. Certify that all parties have filed Disclosure of Interested Persons as directed in the Order for Conference and Disclosure of Interested Persons, listing the date of filing for the original and any amendments.
23. List the names, bar numbers, addresses, email addresses, and telephone numbers of all counsel.

Counsel for Plaintiff(s)

Date

Counsel for Defendant(s)

Date