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Attorney for (Party's name)

IN THE UNITED STATES DISTRICT COURT  
FOR THE DISTRICT OF ALASKA

	v.	Plaintiff(s),	
		Defendant(s).	Case No. x:xx-cv-00000-SLG

**SCHEDULING AND PLANNING CONFERENCE REPORT**

I. Meeting of the Parties

Based upon information available to the Court through a status report completed by the parties pursuant to Rules 16 and 26(f), Federal Rules of Civil Procedure, and, if one was held, the scheduling and planning conference, this order for the pretrial development of the case is entered pursuant to Rule 16(b), Federal Rules of Civil Procedure.

II. Pre-Discovery Disclosures

A. The information required by Rule 26(a)(1), Federal Rules of Civil Procedure:

1. \_\_\_\_\_ has been exchanged by the parties.
2. \_\_\_\_\_ shall be exchanged by the parties on or before \_\_\_\_\_.

B. Preliminary witness lists:

1. \_\_\_\_ have been exchanged by the parties.
2. \_\_\_\_ shall be exchanged by the parties on or before \_\_\_\_\_.

Each party must contemporaneously prepare and maintain a written record of all disclosures and supplementation of disclosures or responses made to requests for discovery under Rule 26(a) and (e), Federal Rules of Civil Procedure. Unless required in support of a motion or by order of the Court, disclosures and supplemental disclosures are not to be filed with the Court.

III. Discovery Plan

Discovery shall be conducted in accordance with Rules 26 through 37 of the Federal Rules of Civil Procedure, any applicable Local Rules, and the discovery plan contained in the status report of the parties except as otherwise provided below.

A. Preserving discovery information.

1. \_\_\_\_ There is no indication that this will be an issue.
2. \_\_\_\_ *[Other]*

B. Discovery or disclosure of electronically stored information shall be handled as follows:

1. \_\_\_\_ The parties may proceed as they have proposed.
2. \_\_\_\_ *[Other]*

C. Claims of privilege or protection of trial preparation materials shall be handled as follows:

1. \_\_\_\_ There is no indication that this will be an issue.
2. \_\_\_\_ The parties have entered into a confidentiality agreement.
3. \_\_\_\_ The parties shall submit their proposed confidentiality agreement on or before \_\_\_\_\_.

D. Expert witness disclosures in accordance with Rule 26(a)(2) shall be made:

1. \_\_\_\_ by all parties on or before \_\_\_\_\_.
2. \_\_\_\_ by plaintiff(s) on or before \_\_\_\_\_ and  
by defendant(s) on or before \_\_\_\_\_.
3. \_\_\_\_ Rebuttal reports shall be disclosed on or before **30 days after service of the report being rebutted.**

E. Disclosures and discovery responses shall be supplemented in accordance with Rule 26(e):

1. \_\_\_\_ at intervals of \_\_\_\_ days; and final supplementations shall be served and filed 60 days before the close of fact discovery.
2. \_\_\_\_ as new information is acquired, but not later than 60 days before the close of fact discovery.

F. A final **discovery** witness list, disclosing all lay and expert witnesses that a party may wish to call at trial either by live testimony or deposition, shall be served and filed not later than: \_\_\_\_\_. (This date shall be no later than 45 days before the close of discovery.)

Unless otherwise ordered for good cause shown, only those witnesses disclosed in this final **discovery** witness list will be permitted to testify at trial.

Expert witnesses will be identified as such and as to their area(s) of expertise, and a statement of each expert's qualifications will be appended to the witness list.

G. Discovery shall be scheduled so as to be completed by:

1. \_\_\_\_ As to all fact discovery, on or before \_\_\_\_\_, and as to all expert discovery, on or before \_\_\_\_\_.

**or**

2. \_\_\_\_ As to all discovery, on or before \_\_\_\_\_.

H. The following limitations on discovery are imposed:

1. \_\_\_\_ The limitations set forth in Federal Rules of Civil Procedure 26(b), 30, and 33 apply, except as indicated below.

2. Depositions.

(a) \_\_\_\_ The maximum number of depositions by each party shall not exceed \_\_\_\_\_.

(b) (1) \_\_\_\_ Depositions shall not exceed \_\_\_\_\_ hours as to any deponent.

**or**

(2) (a) \_\_\_\_ Depositions shall not exceed \_\_\_\_ hours as to non-party deponents.

(b) \_\_\_\_ Depositions shall not exceed \_\_\_\_ hours  
as to party<sup>2</sup> deponents.

3. \_\_\_\_ The maximum number of interrogatories posed by each party shall not exceed \_\_\_\_\_.
4. \_\_\_\_ The maximum number of requests for admissions posed by each party shall not exceed \_\_\_\_\_.
5. \_\_\_\_ *[Other limitations:]*

#### IV. Pretrial Motions

A. Preliminary motions as to jurisdiction, venue, arbitration, and/or statutes of limitation shall be served and filed not later than:

1. X Not applicable.
2. \_\_\_\_ *[Date:]*

B. Motions to amend, motions under the discovery rules, motions in limine, and dispositive motions:

1. X shall be served and filed within the times specified by the applicable rules, except as indicated below.
2. \_\_\_\_ Motions to amend pleadings or add parties shall be served and filed not later than \_\_\_\_\_. Thereafter, a party may seek

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<sup>2</sup> Unless otherwise specified, the Court will consider corporate officer, Rule 30(b)(6) witness, and expert witness depositions to be subject to the time limitation applicable to party depositions.

leave of the Court to modify this deadline. See Civil Rule 16(3)(A) and (4).

3. \_\_\_\_ Motions under the discovery rules shall be served and filed not later than \_\_\_\_\_.
4. \_\_\_\_ Motions in limine shall be served and filed not later than \_\_\_\_\_.
5. \_\_\_\_ Dispositive motions shall be served and filed not later than \_\_\_\_\_.
6. \_\_\_\_ Motions as to the qualifications of experts and Daubert motions shall be filed and served not later than \_\_\_\_\_.

V. Further Pretrial Proceedings

A. \_\_\_\_ The parties have not requested a scheduling conference with the Court.

B. \_\_\_\_ The parties have not consented to all further proceedings in this case being before a United States Magistrate Judge.

C. With reference to the disclosure requirements of Rule 7.1, Federal Rules of Civil Procedure:

1. \_\_\_\_ The parties are in compliance or the rule is not applicable.
2. \_\_\_\_ Compliance shall be accomplished on or before \_\_\_\_\_.

D. The parties have considered and reported to the Court regarding possible alternative dispute resolution procedures.

E. Either party may request a trial setting conference at any time to establish a trial date. The Court, on its own initiative, will schedule a trial setting conference after the close of discovery.

VI. Trial

It is estimated that this case will require \_\_\_ days for trial by jury.

VII. Report Form

A. Have counsel experienced any problem(s) in suing this form?

\_\_\_ Yes \_\_\_ No. If yes, please explain: (explanation).

B. Are there any subjects that counsel would like to see added to this form?

\_\_\_ Yes \_\_\_ No. If yes, please explain (explanation).

Dated: