Ana, California. Unless excused for good cause shown in advance of the scheduling conference, **lead counsel** shall appear at the scheduling conference and at all pretrial hearings fully informed concerning the facts of the case.

1. <u>Joint Rule 26(f) Report and ADR-01 Form</u>

As provided in Fed. R. Civ. P. 26(f), the parties shall meet at least 21 days before the scheduling conference and file a Joint 26(f) Report ("Report") **no later than 14 days before the date set for the scheduling conference**. The Report shall be drafted by plaintiff (unless the parties agree otherwise), but shall be submitted and signed jointly. "Jointly" contemplates a single report, regardless of how many separately-represented parties there are. The Report shall separately address all matters described below, which include those required to be discussed by Fed. R. Civ. P. 26(f) and Local Rule 26:

- a. <u>Statement of the case</u>: a short synopsis (not to exceed two pages) of the main claims, counterclaims, and affirmative defenses.
- b. <u>Legal issues</u>: a brief description of the key legal issues, including any unusual substantive, procedural, or evidentiary issues.
- c. <u>Damages</u>: the realistic range of provable damages.
- d. <u>Insurance</u>: whether there is insurance coverage, the extent of coverage, and whether there is a reservation of rights.
- e. <u>Motions</u>: a statement of the likelihood of motions seeking to add other parties or claims, file amended pleadings, transfer venue, etc.
- f. <u>Manual for Complex Litigation</u>: whether all or part of the procedures of the Manual for Complex Litigation should be utilized.
- g. <u>Status of Discovery</u>: a discussion of the present state of discovery, including a summary of completed discovery.
- h. <u>Discovery Plan</u>: a detailed discovery plan, as contemplated by Fed. R. Civ. P. 26(f)(3), including a discussion of the proposed dates for expert witness disclosures under Fed. R. Civ. P. 26(a)(2)(see Local Rule 26-1(f)).

- A statement that discovery will be conducted as to all claims and defenses, or other vague description, is not acceptable.
- <u>Discovery cut-off</u>: a proposed discovery cut-off date. This means the final day for completion of discovery.
- j. <u>Dispositive motions</u>: a description of the issues or claims that any party believes may be determined by motion for summary judgment or motion *in limine*.
- k. Settlement: a statement of what settlement discussions or written communications have occurred (excluding any statement of the terms discussed) and a statement pursuant to Local Rule 16-15.4 selecting a settlement mechanism under that Rule. Note, however, that the parties may not choose a settlement conference before the magistrate judge.

 Along with the Report, parties shall submit a completed ADR-01 "Settlement Procedure Selection" Form that designates selection of either Settlement Procedure 2 or 3. A copy of the ADR-01 form can be found in the "Forms" section of the Central District of California's official website (http://www.cacd.uscourts.gov). No case will proceed to trial unless all parties, including the principals of all corporate parties, have appeared personally at a settlement conference.
- 1. <u>Trial estimate</u>: a realistic estimate of the time required for trial and whether trial will be by jury or by court. Each side should specify (by number, not by name) how many witnesses it contemplates calling. If the time estimate for trial given in the Report exceeds four court days, counsel shall be prepared to discuss in detail the estimate.
- m. <u>Trial counsel</u>: the name(s) of the attorney(s) who will try the case.
- n. <u>Independent Expert or Master</u>: whether this is a case in which the Court should consider appointing a master pursuant to Fed. R. Civ. P. 53 or an independent scientific expert. (The appointment of a master may be

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