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UNITED STATES DISTRICT COURT
EASTERN DISTRICT OF CALIFORNIA

KATHLEEN GARCIA,
Plaintiff,

Case No. 1:24-cv-00166-JLT SKO

v.

ORDER re SETTLEMENT CONFERENCE

METROPOLITAN LIFE INSURANCE
COMPANY.
Defendant.

_____ /

This case is now set for a Settlement Conference before Magistrate Judge Sheila K. Oberto on February 27, 2025, at 10:30 AM at the U.S. District Court, 2500 Tulare Street, Fresno, California, 93721.

Consideration of settlement is a serious matter that requires thorough preparation prior to the settlement conference. Accordingly, IT IS HEREBY ORDERED that:

1. Pre-settlement Conference Exchange of Demand and Offer

A settlement conference is more likely to be productive if, before the conference, the parties exchange written settlement proposals. Accordingly, at least **5 weeks** prior to the settlement conference, counsel for each plaintiff shall submit an updated written itemization of damages and settlement demand to each defense counsel with a brief summary of the legal and factual basis supporting the demand. No later than **4 weeks** prior to the settlement conference, each defense counsel shall submit a written offer to counsel for each plaintiff with a brief summary of the legal and factual basis supporting the offer.

2. Submission and Content of Confidential Settlement Conference Statements

1 The parties are to send Confidential Settlement Conference Statements (Settlement
2 Statement) to the following email address: SKOorders@caed.uscourts.gov, to arrive no later than
3 **14 days** before the conference. Each statement shall be clearly marked “CONFIDENTIAL” with
4 the date and time of the mandatory settlement conference indicated prominently. Each party shall
5 also file a Notice of Submission of Confidential Settlement Conference Statement. (See L.R. 270
6 (d).)

7 If the Settlement Conference is continued for any reason, each party must submit a new
8 Settlement Statement that is complete in itself, without reference to any prior Settlement
9 Statements.

10 Each Settlement Statement *shall include the following*:

- 11 a. A brief summary of the core facts, allegations, and defenses, a forthright
12 evaluation of the parties’ likelihood of prevailing on the claims and
13 defenses, and a description of the major issues in dispute.
- 14 b. A summary of the proceedings to date.
- 15 c. An estimate of the cost and time to be expended for further discovery,
16 pretrial, and trial.
- 17 d. The nature of the relief sought.
- 18 e. An outline of past settlement efforts including information regarding the
19 “Pre-settlement Conference Exchange of Demand and Offer” required
20 above—*including the itemization of damages*—and a history of past
21 settlement discussions, offers, and demands.
- 22 f. A statement of each party’s expectations and goals for the Settlement
23 Conference.

24 **3. Zoom Videoconferences**

25 Although the parties shall be prepared to attend the settlement conference in person, they
26 may jointly request that the settlement conference be conducted by Zoom videoconference. If the
27 Court determines that a Zoom videoconference would be productive and the request for a Zoom
28

1 videoconference is granted, the Court will provide call in information before the settlement
2 conference date.

3 4 **4. Attendance of Trial Counsel and Parties Required**

5 Unless otherwise permitted in advance by the Court, the attorneys who will try the case and
6 parties with full and complete settlement authority shall personally attend the conference.¹ An
7 insured party shall appear by a representative of the insurer who is authorized to negotiate, and who
8 has *full authority to negotiate and settle the case*. An uninsured corporate party shall appear by a
9 representative authorized to negotiate, and who has *full authority to negotiate and settle the case*. It
10 is difficult for a party who is not present to appreciate the process and the reasons that may justify
11 a change in one's perspective toward settlement. Accordingly, having a client with authority
12 available by telephone is *not* an acceptable alternative, except under the most extenuating
13 circumstances.²

14 The Court expects both the lawyers and the party representatives to be fully prepared to
15 participate. The Court encourages all parties to keep an open mind in order to reassess their previous
16 positions and to discover creative means for resolving the dispute.

17 18 **5. Issues to Be Discussed**

19 The parties *shall* be prepared to discuss the following at the settlement conference:

- 20 a. Goals in the litigation and problems they would like to address in the
21 settlement conference and understanding of the opposing side's goals.
- 22 b. The issues (in and outside the lawsuit) that need to be resolved.
- 23 c. The strengths and weaknesses of their case.
- 24 d. Their understanding of the opposing side's view of the case.
- 25 e. Their points of agreement and disagreement (factual and legal).

26 _____
27 ¹ Insurance carriers, business organizations, and governmental bodies or agencies whose settlement agreements are
28 subject to approval by legislative bodies, executive committees, boards of directors or the like shall be represented by
a person or persons who occupy high executive positions in the party organization and who will be directly involved
in the process of approval of any settlement offers or agreements.

² Out of town or out of state travel and the purchase of an airplane ticket are not extenuating circumstances.

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- f. Any financial, emotional, and/or legal impediments to settlement.
- g. Whether settlement or further litigation better enables the accomplishment of their respective goals.
- h. Any possibilities for a creative resolution of the dispute.

6. Statements Inadmissible

The parties are expected to address each other with courtesy and respect, and are encouraged to be frank and open in their discussions. Statements made by any party during the settlement conference are not to be used in discovery and will not be admissible at trial.

7. Pre-Settlement Discussion

Prior to the Settlement Conference, Magistrate Judge Oberto will hold a brief, telephonic discussion on February 20, 2025, at 4:00 PM (dial-in number: 1-669-254-5252; passcode: 160 801 1115). Only attorneys and unrepresented parties are required to participate in the conference.

IT IS SO ORDERED.

Dated: November 22, 2024

/s/ Sheila K. Oberto
UNITED STATES MAGISTRATE JUDGE