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18 CENTRALREACH, LLC; AND  
19 GREGORY PACQUETTE

20 **UNITED STATES DISTRICT COURT**  
21 **NORTHERN DISTRICT OF CALIFORNIA**

22 BEHAVIOR ANALYSTS, INC., a  
23 California corporation,

24 Plaintiff,

25 v.

26 CENTRALREACH, LLC; AND  
27 GREGORY PACQUETTE, an individual,

28 Defendants.

Case No. 3:17-cv-00666-MEJ

**STIPULATED PROTECTIVE ORDER**

Judge: Hon. Maria-Elena James

Complaint Filed: February 9, 2017

Trial Date: None Set.

1. PURPOSES AND LIMITATIONS

Disclosure and discovery activity in this action are likely to involve production of confidential, proprietary, or private information for which special protection from public disclosure and from use for any purpose other than prosecuting this litigation may be warranted.

Accordingly, the parties hereby stipulate to and petition the court to enter the following Stipulated

1 Protective Order. The parties acknowledge that this Order does not confer blanket protections on  
2 all disclosures or responses to discovery and that the protection it affords from public disclosure  
3 and use extends only to the limited information or items that are entitled to confidential treatment  
4 under the applicable legal principles. The parties further acknowledge, as set forth in Section  
5 12.3, below, that this Stipulated Protective Order does not entitle them to file confidential  
6 information under seal; Civil Local Rule 79-5 sets forth the procedures that must be followed and  
7 the standards that will be applied when a party seeks permission from the court to file material  
8 under seal.

9 2. DEFINITIONS

10 2.1 Challenging Party: a Party or Non-Party that challenges the designation of  
11 information or items under this Order.

12 2.2 “CONFIDENTIAL” Information or Items: information (regardless of how it is  
13 generated, stored or maintained) or tangible things that qualify for protection under Federal Rule  
14 of Civil Procedure 26(c).

15 2.3 Counsel (without qualifier): Outside Counsel of Record and House Counsel (as  
16 well as their support staff).

17 2.4 Designating Party: a Party or Non-Party that designates information or items that it  
18 produces in disclosures or in responses to discovery as “CONFIDENTIAL.”

19 2.5 Disclosure or Discovery Material: all items or information, regardless of the  
20 medium or manner in which it is generated, stored, or maintained (including, among other things,  
21 testimony, transcripts, and tangible things), that are produced or generated in disclosures or  
22 responses to discovery in this matter.

23 2.6 Expert: a person with specialized knowledge or experience in a matter pertinent to  
24 the litigation who has been retained by a Party or its counsel to serve as an expert witness or as a  
25 consultant in this action.

26 2.7 House Counsel: attorneys who are employees of a party to this action. House  
27 Counsel does not include Outside Counsel of Record or any other outside counsel.

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1           2.8    Non-Party: any natural person, partnership, corporation, association, or other legal  
2 entity not named as a Party to this action.

3           2.9    Outside Counsel of Record: attorneys who are not employees of a party to this  
4 action but are retained to represent or advise a party to this action and have appeared in this action  
5 on behalf of that party or are affiliated with a law firm which has appeared on behalf of that party.

6           2.10 Party: any party to this action, including all of its officers, directors, employees,  
7 consultants, retained experts, and Outside Counsel of Record (and their support staffs).

8           2.11 Producing Party: a Party or Non-Party that produces Disclosure or Discovery  
9 Material in this action.

10          2.12 Professional Vendors: persons or entities that provide litigation support services  
11 (e.g., photocopying, videotaping, translating, preparing exhibits or demonstrations, and  
12 organizing, storing, or retrieving data in any form or medium) and their employees and  
13 subcontractors.

14          2.13 Protected Material: any Disclosure or Discovery Material that is designated as  
15 “CONFIDENTIAL.”

16          2.14 Receiving Party: a Party that receives Disclosure or Discovery Material from a  
17 Producing Party.

18        3.    SCOPE

19           The protections conferred by this Stipulation and Order cover not only Protected Material  
20 (as defined above), but also (1) any information copied or extracted from Protected Material; (2)  
21 all copies, excerpts, summaries, or compilations of Protected Material; and (3) any testimony,  
22 conversations, or presentations by Parties or their Counsel that might reveal Protected Material.  
23 However, the protections conferred by this Stipulation and Order do not cover the following  
24 information: (a) any information that is in the public domain at the time of disclosure to a  
25 Receiving Party or becomes part of the public domain after its disclosure to a Receiving Party as a  
26 result of publication not involving a violation of this Order, including becoming part of the public  
27 record through trial or otherwise; and (b) any information known to the Receiving Party prior to  
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1 the disclosure or obtained by the Receiving Party after the disclosure from a source who obtained  
2 the information lawfully and under no obligation of confidentiality to the Designating Party. Any  
3 use of Protected Material at trial shall be governed by a separate agreement or order.

4 4. DURATION

5 Even after final disposition of this litigation, the confidentiality obligations imposed by this  
6 Order shall remain in effect until a Designating Party agrees otherwise in writing or a court order  
7 otherwise directs. Final disposition shall be deemed to be the later of (1) dismissal of all claims  
8 and defenses in this action, with or without prejudice; and (2) final judgment herein after the  
9 completion and exhaustion of all appeals, rehearings, remands, trials, or reviews of this action,  
10 including the time limits for filing any motions or applications for extension of time pursuant to  
11 applicable law.

12 5. DESIGNATING PROTECTED MATERIAL

13 5.1 Exercise of Restraint and Care in Designating Material for Protection. Each Party  
14 or Non-Party that designates information or items for protection under this Order must take care to  
15 limit any such designation to specific material that qualifies under the appropriate standards. The  
16 Designating Party must designate for protection only those parts of material, documents, items, or  
17 oral or written communications that qualify – so that other portions of the material, documents,  
18 items, or communications for which protection is not warranted are not swept unjustifiably within  
19 the ambit of this Order.

20 Mass, indiscriminate, or routinized designations are prohibited. Designations that are  
21 shown to be clearly unjustified or that have been made for an improper purpose (e.g., to  
22 unnecessarily encumber or retard the case development process or to impose unnecessary  
23 expenses and burdens on other parties) expose the Designating Party to sanctions.

24 If it comes to a Designating Party’s attention that information or items that it designated  
25 for protection do not qualify for protection, that Designating Party must promptly notify all other  
26 Parties that it is withdrawing the mistaken designation.

27 5.2 Manner and Timing of Designations. Except as otherwise provided in this Order  
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1 (see, e.g., second paragraph of section 5.2(a) below), or as otherwise stipulated or ordered,  
2 Disclosure or Discovery Material that qualifies for protection under this Order must be clearly so  
3 designated before the material is disclosed or produced.

4 Designation in conformity with this Order requires:

5 (a) for information in documentary form (e.g., paper or electronic documents,  
6 but excluding transcripts of depositions or other pretrial or trial proceedings), that the Producing  
7 Party affix the legend “CONFIDENTIAL” to each page that contains protected material. If only a  
8 portion or portions of the material on a page qualifies for protection, the Producing Party also must  
9 clearly identify the protected portion(s) (e.g., by making appropriate markings in the margins). A  
10 Party or Non-Party that makes original documents or materials available for inspection need not  
11 designate them for protection until after the inspecting Party has indicated which material it would  
12 like copied and produced. During the inspection and before the designation, all of the material  
13 made available for inspection shall be deemed “CONFIDENTIAL.” After the inspecting Party has  
14 identified the documents it wants copied and produced, the Producing Party must determine which  
15 documents, or portions thereof, qualify for protection under this Order. Then, before producing  
16 the specified documents, the Producing Party must affix the “CONFIDENTIAL” legend to each  
17 page that contains Protected Material. If only a portion or portions of the material on a page  
18 qualifies for protection, the Producing Party also must clearly identify the protected portion(s)  
19 (e.g., by making appropriate markings in the margins).

20 (b) for testimony given in deposition, that the Designating Party identify,  
21 within 10 business days of receipt of the transcript, all portions of the testimony for which  
22 CONFIDENTIAL protection is sought. Testimony given in deposition shall be treated  
23 provisionally as CONFIDENTIAL from the time of the testimony through the earlier of (i) the  
24 Designating Party’s identification of the testimony to be protected; or (ii) 11 business days after  
25 the Designating Party’s receipt of the deposition transcript.

26 (c) for testimony given in other pretrial or trial proceedings, that the  
27 Designating Party identify on the record, before the close of the hearing or other proceeding, all  
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1 protected testimony.

2 (d) for information produced in some form other than documentary and for any  
3 other tangible items, that the Producing Party affix in a prominent place on the exterior of the  
4 container or containers in which the information or item is stored the legend "CONFIDENTIAL."  
5 If only a portion or portions of the information or item warrant protection, the Producing Party, to  
6 the extent practicable, shall identify the protected portion(s).

7 5.3 Inadvertent Failures to Designate. If timely corrected, an inadvertent failure to  
8 designate qualified information or items does not, standing alone, waive the Designating Party's  
9 right to secure protection under this Order for such material. Upon timely correction of a  
10 designation, the Receiving Party must make reasonable efforts to assure that the material is treated  
11 in accordance with the provisions of this Order.

12 6. CHALLENGING CONFIDENTIALITY DESIGNATIONS

13 6.1 Timing of Challenges. Any Party or Non-Party may challenge a designation of  
14 confidentiality at any time. Unless a prompt challenge to a Designating Party's confidentiality  
15 designation is necessary to avoid foreseeable, substantial unfairness, unnecessary economic  
16 burdens, or a significant disruption or delay of the litigation, a Party does not waive its right to  
17 challenge a confidentiality designation by electing not to mount a challenge promptly after the  
18 original designation is disclosed.

19 6.2 Meet and Confer. The Challenging Party shall initiate the dispute resolution  
20 process by providing written notice of each designation it is challenging and describing the basis  
21 for each challenge. To avoid ambiguity as to whether a challenge has been made, the written  
22 notice must recite that the challenge to confidentiality is being made in accordance with this  
23 specific paragraph of the Protective Order. **The parties shall attempt to resolve each challenge**  
24 **in good faith and must begin the process by conferring *in person* within 14 days of the date**  
25 **of service of notice**, in accordance with paragraph 2 of the DISCOVERY STANDING ORDER  
26 FOR MAGISTRATE JUDGE MARIA-ELENA JAMES (the "Discovery Standing Order").

27 In conferring, the Challenging Party must explain the basis for its belief that the  
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1 Protected Material must be stored and maintained by a Receiving Party at a location and in  
2 a secure manner that ensures that access is limited to the persons authorized under this Order.

3 7.2 Disclosure of “CONFIDENTIAL” Information or Items. Unless otherwise ordered  
4 by the court or permitted in writing by the Designating Party, a Receiving Party may disclose any  
5 information or item designated “CONFIDENTIAL” only to:

6 (a) the Receiving Party’s Outside Counsel of Record in this action, as well as  
7 employees of said Outside Counsel of Record to whom it is reasonably necessary to disclose the  
8 information for this litigation;

9 (b) the officers, directors, and employees (including House Counsel) of the  
10 Receiving Party to whom disclosure is reasonably necessary for this litigation and who have  
11 signed the “Acknowledgment and Agreement to Be Bound” (Exhibit A);

12 (c) Experts (as defined in this Order) of the Receiving Party to whom  
13 disclosure is reasonably necessary for this litigation and who have signed the “Acknowledgment  
14 and Agreement to Be Bound” that is attached hereto as Exhibit A;

15 (d) the court and its personnel;

16 (e) court reporters and their staff and Professional Vendors to whom disclosure  
17 is reasonably necessary for this litigation;

18 (f) professional jury or trial consultants and mock jurors to whom disclosure is  
19 reasonably necessary for this litigation and who have signed the “Acknowledgment and  
20 Agreement to Be Bound” (Exhibit A);

21 (g) during their depositions, witnesses in the action to whom disclosure is  
22 reasonably necessary and who have signed the “Acknowledgment and Agreement to Be Bound”  
23 (Exhibit A), unless otherwise agreed by the Designating Party or ordered by the court. Pages of  
24 transcribed deposition testimony or exhibits to depositions that reveal Protected Material must be  
25 separately bound by the court reporter and may not be disclosed to anyone except as permitted  
26 under this Stipulated Protective Order.

27 (h) the author or recipient of a document containing the information or a  
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1 custodian or other person who otherwise possessed or knew the information.

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3 8. PROTECTED MATERIAL SUBPOENAED OR ORDERED PRODUCED IN OTHER  
4 LITIGATION

5 If a Party is served with a subpoena or a court order issued in other litigation that compels  
6 disclosure of any information or items designated in this action as “CONFIDENTIAL,” that Party  
7 must:

8 (a) promptly notify in writing the Designating Party. Such notification shall  
9 include a copy of the subpoena or court order;

10 (b) promptly notify in writing the party who caused the subpoena or order to  
11 issue in the other litigation that some or all of the material covered by the subpoena or order is  
12 subject to this Protective Order. Such notification shall include a copy of this Stipulated Protective  
13 Order; and

14 (c) cooperate with respect to all reasonable procedures sought to be pursued by  
15 the Designating Party whose Protected Material may be affected.

16 If the Designating Party timely seeks a protective order, the Party served with the subpoena  
17 or court order shall not produce any information designated in this action as “CONFIDENTIAL”  
18 before a determination by the court from which the subpoena or order issued, unless the Party has  
19 obtained the Designating Party’s permission. The Designating Party shall bear the burden and  
20 expense of seeking protection in that court of its confidential material – and nothing in these  
21 provisions should be construed as authorizing or encouraging a Receiving Party in this action to  
22 disobey a lawful directive from another court.

23 9. A NON-PARTY’S PROTECTED MATERIAL SOUGHT TO BE PRODUCED IN THIS  
24 LITIGATION

25 (a) The terms of this Order are applicable to information produced by a Non-  
26 Party in this action and designated as “CONFIDENTIAL.” Such information produced by Non-  
27 Parties in connection with this litigation is protected by the remedies and relief provided by this  
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1 Order. Nothing in these provisions should be construed as prohibiting a Non-Party from seeking  
2 additional protections.

3 (b) In the event that a Party is required, by a valid discovery request, to produce  
4 a Non-Party's confidential information in its possession, and the Party is subject to an agreement  
5 with the Non-Party not to produce the Non-Party's confidential information, then the Party shall:

6 (1) promptly notify in writing the Requesting Party and the Non-Party  
7 that some or all of the information requested is subject to a confidentiality agreement with a Non-  
8 Party;

9 (2) promptly provide the Non-Party with a copy of the Stipulated  
10 Protective Order in this litigation, the relevant discovery request(s), and a reasonably  
11 specific description of the information requested; and

12 (3) make the information requested available for inspection by the Non-  
13 Party.

14 (c) If the Non-Party fails to object or seek a protective order from this court  
15 within 14 days of receiving the notice and accompanying information, the Receiving Party may  
16 produce the Non-Party's confidential information responsive to the discovery request. If the Non-  
17 Party timely seeks a protective order, the Receiving Party shall not produce any information in its  
18 possession or control that is subject to the confidentiality agreement with the Non-Party before a  
19 determination by the court. Absent a court order to the contrary, the Non-Party shall bear the  
20 burden and expense of seeking protection in this court of its Protected Material.

21 10. UNAUTHORIZED DISCLOSURE OF PROTECTED MATERIAL

22 If a Receiving Party learns that, by inadvertence or otherwise, it has disclosed Protected  
23 Material to any person or in any circumstance not authorized under this Stipulated Protective  
24 Order, the Receiving Party must immediately (a) notify in writing the Designating Party of the  
25 unauthorized disclosures, (b) use its best efforts to retrieve all unauthorized copies of the Protected  
26 Material, (c) inform the person or persons to whom unauthorized disclosures were made of all the  
27 terms of this Order, and (d) request such person or persons to execute the "Acknowledgment and  
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1 Agreement to Be Bound” that is attached hereto as Exhibit A.

2 11. INADVERTENT PRODUCTION OF PRIVILEGED OR OTHERWISE PROTECTED  
3 MATERIAL

4 When a Producing Party gives notice to Receiving Parties that certain inadvertently  
5 produced material is subject to a claim of privilege or other protection, the obligations of the  
6 Receiving Parties are those set forth in Federal Rule of Civil Procedure 26(b)(5)(B). This  
7 provision is not intended to modify whatever procedure may be established in an e-discovery order  
8 that provides for production without prior privilege review. Pursuant to Federal Rule of Evidence  
9 502(d) and (e), insofar as the parties reach an agreement on the effect of disclosure of a  
10 communication or information covered by the attorney-client privilege or work product protection,  
11 the parties may incorporate their agreement in the stipulated protective order submitted to the  
12 court.

13 12. MISCELLANEOUS

14 12.1 Right to Further Relief. Nothing in this Order abridges the right of any person to  
15 seek its modification by the court in the future.

16 12.2 Right to Assert Other Objections. By stipulating to the entry of this Protective  
17 Order no Party waives any right it otherwise would have to object to disclosing or producing any  
18 information or item on any ground not addressed in this Stipulated Protective Order. Similarly, no  
19 Party waives any right to object on any ground to use in evidence of any of the material covered  
20 by this Protective Order.

21 12.3 Filing Protected Material. Without written permission from the Designating Party  
22 or a court order secured after appropriate notice to all interested persons, a Party may not file in  
23 the public record in this action any Protected Material. A Party that seeks to file under seal any  
24 Protected Material must comply with Civil Local Rule 79-5. Protected Material may only be filed  
25 under seal pursuant to a court order authorizing the sealing of the specific Protected Material at  
26 issue. Pursuant to Civil Local Rule 79-5, a sealing order will issue only upon a request  
27 establishing that the Protected Material at issue is privileged, protectable as a trade secret, or  
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1 otherwise entitled to protection under the law. If a Receiving Party's request to file Protected  
2 Material under seal pursuant to Civil Local Rule 79-5(d) is denied by the court, then the Receiving  
3 Party may file the information in the public record pursuant to Civil Local Rule 79-5(e) unless  
4 otherwise instructed by the court.

5 13. FINAL DISPOSITION

6 Within 60 days after the final disposition of this action, as defined in paragraph 4, each  
7 Receiving Party must return all Protected Material to the Producing Party or destroy such material.  
8 As used in this subdivision, "all Protected Material" includes all copies, abstracts, compilations,  
9 summaries, and any other format reproducing or capturing any of the Protected Material. Whether  
10 the Protected Material is returned or destroyed, the Receiving Party must submit a written  
11 certification to the Producing Party (and, if not the same person or entity, to the Designating Party)  
12 by the 60 day deadline that (1) identifies (by category, where appropriate) all the Protected  
13 Material that was returned or destroyed and (2) affirms that the Receiving Party has not retained  
14 any copies, abstracts, compilations, summaries or any other format reproducing or capturing any  
15 of the Protected Material. Notwithstanding this provision, Counsel are entitled to retain an archival  
16 copy of all pleadings, motion papers, trial, deposition, and hearing transcripts, legal memoranda,  
17 correspondence, deposition and trial exhibits, expert reports, attorney work product, and  
18 consultant and expert work product, even if such materials contain Protected Material. Any such  
19 archival copies that contain or constitute Protected Material remain subject to this Protective Order  
20 as set forth in Section 4 (DURATION).

21 IT IS SO STIPULATED, THROUGH COUNSEL OF RECORD.

22  
23 DATED: September 1, 2017

/s/ Katherine F. Wenger  
Katherine F. Wenger  
Attorneys for Plaintiff  
BEHAVIOR ANALYSTS, INC.

24  
25  
26 DATED: September 1, 2017

/s/ Julie D. Greer  
Julie D. Greer  
Attorneys for Defendants



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**EXHIBIT A**

ACKNOWLEDGMENT AND AGREEMENT TO BE BOUND

I, \_\_\_\_\_ [print or type full name], of \_\_\_\_\_ [print or type full address], declare under penalty of perjury that I have read in its entirety and understand the Stipulated Protective Order that was issued by the United States District Court for the Northern District of California on [date] in the case of *Behavior v. CentralReach Analysts, Inc. v. CentralReach, LLC*, United States District Court, Northern District of California, Case No. 17-cv-00666-MEJ. I agree to comply with and to be bound by all the terms of this Stipulated Protective Order and I understand and acknowledge that failure to so comply could expose me to sanctions and punishment in the nature of contempt. I solemnly promise that I will not disclose in any manner any information or item that is subject to this Stipulated Protective Order to any person or entity except in strict compliance with the provisions of this Order.

I further agree to submit to the jurisdiction of the United States District Court for the Northern District of California for the purpose of enforcing the terms of this Stipulated Protective Order, even if such enforcement proceedings occur after termination of this action.

I hereby appoint \_\_\_\_\_ [print or type full name] of \_\_\_\_\_ [print or type full address and telephone number] as my California agent for service of process in connection with this action or any proceedings related to enforcement of this Stipulated Protective Order.

Date: \_\_\_\_\_

City and State where sworn and signed: \_\_\_\_\_

Printed name: \_\_\_\_\_

Signature: \_\_\_\_\_