

THE HONORABLE ROBERT S. LASNIK

UNITED STATES DISTRICT COURT  
WESTERN DISTRICT OF WASHINGTON  
AT SEATTLE

MARSHA LINEHAN, an individual,

Plaintiff,

v.

LANE PEDERSON, an individual, and  
COGNITIVE AND BEHAVIORAL  
SPECIALTIES d/b/a DIALECTICAL  
BEHAVIOR THERAPY NATIONAL  
CERTIFICATION AND  
ACCREDITATION  
ASSOCIATION, a Minnesota non-profit  
corporation,

Defendants.

No. 2:17-cv-01494 RSL

AMENDED STIPULATED PROTECTIVE  
ORDER

1. PURPOSES AND LIMITATIONS

Discovery in this action is likely to involve production of confidential, proprietary, or private information for which special protection may be warranted. Accordingly, the parties hereby stipulate to and petition the Court to enter the following Stipulated Protective Order. The parties acknowledge that this agreement is consistent with LCR 26(c). It does not confer blanket protection on all disclosures or responses to discovery, the protection it affords from public disclosure and use extends only to the limited information or items that are entitled to confidential treatment under the applicable legal principles, and it does not presumptively entitle parties to file confidential information under seal.

AMENDED STIPULATED PROTECTIVE  
ORDER

(No. 2:17-cv-01494 RSL) -1

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**Perkins Coie LLP**  
1201 Third Avenue, Suite 4900  
Seattle, WA 98101-3099  
Phone: 206.359.8000  
Fax: 206.359.9000

1           2.     “CONFIDENTIAL” MATERIAL

2           “Confidential” material shall include the following documents and tangible things  
3 produced or otherwise exchanged:

- 4           • confidential financial information, including personal financial statements,  
5 income source documents, and tax returns; and
- 6           • the rates and other terms and conditions applicable to training, consultation,  
7 therapy, and other goods and services provided by the parties using Plaintiff’s  
8 alleged trademarks.

9           This is an action between competitors. The foregoing information warrants protection for  
10 privacy reasons and to preserve confidential, proprietary information developed by the parties at  
11 their expense for a competitive advantage in providing such goods and services.

12           The foregoing is not an acknowledgment by any party that any materials so listed above  
13 are relevant or discoverable for any purpose in this action.

14           3.     SCOPE

15           The protections conferred by this agreement cover not only confidential material (as  
16 defined above), but also (1) any information copied or extracted from confidential material; (2)  
17 all copies, excerpts, summaries, or compilations of confidential material; and (3) any testimony,  
18 conversations, or presentations by parties or their counsel contain confidential material.

19           However, the protections conferred by this agreement do not cover information that is in  
20 the public domain or becomes part of the public domain through trial or otherwise.

21           4.     ACCESS TO AND USE OF CONFIDENTIAL MATERIAL

22           4.1     Basic Principles. A receiving party may use confidential material that is disclosed  
23 or produced by another party or by a non-party in connection with this case only for prosecuting,  
24 defending, or attempting to settle this litigation. Confidential material may be disclosed only to  
25 the categories of persons and under the conditions described in this agreement. Confidential  
26

1 material must be stored and maintained by a receiving party at a location and in a secure manner  
2 that ensures that access is limited to the persons authorized under this agreement.

3 4.2 Disclosure of "CONFIDENTIAL" Information or Items. Unless otherwise  
4 ordered by the court or permitted in writing by the designating party, the receiving party may  
5 disclose confidential information only to:

6 (a) the receiving party's counsel of record in this action, as well as employees of  
7 counsel to whom it is reasonably necessary to disclose the information for this litigation;

8 (b) the parties to this action;

9 (c) experts and consultants to whom disclosure is reasonably necessary for this  
10 litigation and who have signed the "Acknowledgment and Agreement to Be Bound" (Exhibit A);

11 (d) the Court, court personnel, and court reporters and their staff, if filed under seal;

12 (e) copy or imaging services retained by counsel to assist in the duplication of  
13 confidential material, provided that counsel for the party retaining the copy or imaging service  
14 instructs the service not to disclose any confidential material to third parties and to immediately  
15 return all originals and copies of any confidential material;

16 (f) during their depositions, witnesses in the action to whom disclosure is reasonably  
17 necessary and who have signed the "Acknowledgment and Agreement to Be Bound" (Exhibit  
18 A), unless otherwise agreed by the designating party or ordered by the court. Pages of  
19 transcribed deposition testimony or exhibits to depositions that reveal confidential material must  
20 be separately bound by the court reporter and may not be disclosed to anyone except as permitted  
21 under this agreement;

22 (g) the author or recipient of a document containing the information or a custodian or  
23 other person who otherwise possessed or knew the information.

24 4.3 Filing Confidential Material. Before filing confidential material or discussing or  
25 referencing such material in court filings, the filing party shall confer with the designating party  
26 to determine whether the designating party will remove the confidential designation, whether the

1 document can be redacted, or whether a motion to seal or stipulation and proposed order is  
2 warranted. Local Civil Rule 5(g) sets forth the procedures that must be followed and the  
3 standards that will be applied when a party seeks permission from the court to file material under  
4 seal.

5 5. DESIGNATING PROTECTED MATERIAL

6 5.1 Exercise of Restraint and Care in Designating Material for Protection. Each party  
7 or non-party that designates information or items for protection under this agreement must take  
8 care to limit any such designation to specific material that qualifies under the appropriate  
9 standards, as described in paragraph 2, above. The designating party must designate for  
10 protection only those parts of material, documents, items, or written communications that  
11 qualify, so that other portions of the material, documents, items, or communications for which  
12 protection is not warranted are not swept unjustifiably within the ambit of this agreement.

13 Mass, indiscriminate, or routinized designations are prohibited. Designations that are  
14 shown to be clearly unjustified or that have been made for an improper purpose (e.g., to  
15 unnecessarily encumber or delay the case development process or to impose unnecessary  
16 expenses and burdens on other parties) expose the designating party to sanctions.

17 If it comes to a designating party's attention that information or items that it designated  
18 for protection do not qualify for protection, the designating party must promptly notify all other  
19 parties that it is withdrawing the mistaken designation.

20 5.2 Manner and Timing of Designations. Except as otherwise provided in this  
21 agreement (see, e.g., second paragraph of section 5.2(a) below), or as otherwise stipulated or  
22 ordered, disclosure or discovery material that qualifies for protection under this agreement must  
23 be clearly so designated before or when the material is disclosed or produced.

24 (a) Information in documentary form: (e.g., paper or electronic documents and  
25 deposition exhibits, but excluding transcripts of depositions or other pretrial or trial proceedings),  
26 the designating party must affix the word "CONFIDENTIAL" to each page that contains

1 confidential material. If only a portion or portions of the material on a page qualifies for  
2 protection, the producing party also must clearly identify the protected portion(s) (e.g., by  
3 making appropriate markings in the margins).

4 (b) Testimony given in deposition or in other pretrial proceedings: the parties and any  
5 participating non-parties must identify on the record, during the deposition or other pretrial  
6 proceeding, all protected testimony, without prejudice to their right to so designate other  
7 testimony after reviewing the transcript. Any party or non-party may, within fifteen days after  
8 receiving the transcript of the deposition or other pretrial proceeding, designate portions of the  
9 transcript, or exhibits thereto, as confidential. If a party or non-party desires to protect  
10 confidential information at trial, the issue should be addressed during the pre-trial conference.

11 (c) Other tangible items: the producing party must affix in a prominent place on the  
12 exterior of the container or containers in which the information or item is stored the word  
13 "CONFIDENTIAL." If only a portion or portions of the information or item warrant protection,  
14 the producing party, to the extent practicable, shall identify the protected portion(s).

15 5.3 Inadvertent Failures to Designate. If timely corrected, an inadvertent failure to  
16 designate qualified information or items does not, standing alone, waive the designating party's  
17 right to secure protection under this agreement for such material. Upon timely correction of a  
18 designation, the receiving party must make reasonable efforts to ensure that the material is  
19 treated in accordance with the provisions of this agreement.

## 20 6. CHALLENGING CONFIDENTIALITY DESIGNATIONS

21 6.1 Timing of Challenges. Any party or non-party may challenge a designation of  
22 confidentiality at any time. Unless a prompt challenge to a designating party's confidentiality  
23 designation is necessary to avoid foreseeable, substantial unfairness, unnecessary economic  
24 burdens, or a significant disruption or delay of the litigation, a party does not waive its right to  
25 challenge a confidentiality designation by electing not to mount a challenge promptly after the  
26 original designation is disclosed.

1           6.2    Meet and Confer. The parties must make every attempt to resolve any dispute  
2 regarding confidential designations without court involvement. Any motion regarding  
3 confidential designations or for a protective order must include a certification, in the motion or in  
4 a declaration or affidavit, that the movant has engaged in a good faith meet and confer  
5 conference with other affected parties in an effort to resolve the dispute without court action. The  
6 certification must list the date, manner, and participants to the conference. A good faith effort to  
7 confer requires a face-to-face meeting or a telephone conference.

8           6.3    Judicial Intervention. If the parties cannot resolve a challenge without court  
9 intervention, the designating party may file and serve a motion to retain confidentiality under  
10 Local Civil Rule 7 (and in compliance with Local Civil Rule 5(g), if applicable). The burden of  
11 persuasion in any such motion shall be on the designating party. Frivolous challenges, and those  
12 made for an improper purpose (e.g., to harass or impose unnecessary expenses and burdens on  
13 other parties) may expose the challenging party to sanctions. All parties shall continue to  
14 maintain the material in question as confidential until the court rules on the challenge.

15           7.     PROTECTED MATERIAL SUBPOENAED OR ORDERED PRODUCED IN  
16 OTHER LITIGATION

17           If a party is served with a subpoena or a court order issued in other litigation that compels  
18 disclosure of any information or items designated in this action as "CONFIDENTIAL," that  
19 party must:

20           (a)    promptly notify the designating party in writing and include a copy of the  
21 subpoena or court order;

22           (b)    promptly notify in writing the party who caused the subpoena or order to issue in  
23 the other litigation that some or all of the material covered by the subpoena or order is subject to  
24 this agreement. Such notification shall include a copy of this agreement; and

25           (c)    cooperate with respect to all reasonable procedures sought to be pursued by the  
26 designating party whose confidential material may be affected.

1           8.       UNAUTHORIZED DISCLOSURE OF PROTECTED MATERIAL

2           If a receiving party learns that, by inadvertence or otherwise, it has disclosed confidential  
3 material to any person or in any circumstance not authorized under this agreement, the receiving  
4 party must immediately (a) notify in writing the designating party of the unauthorized  
5 disclosures, (b) use its best efforts to retrieve all unauthorized copies of the protected material,  
6 (c) inform the person or persons to whom unauthorized disclosures were made of all the terms of  
7 this agreement, and (d) request that such person or persons execute the “Acknowledgment and  
8 Agreement to Be Bound” that is attached hereto as Exhibit A.

9           9.       INADVERTENT PRODUCTION OF PRIVILEGED OR OTHERWISE  
10 PROTECTED MATERIAL

11           When a producing party gives notice to receiving parties that certain inadvertently  
12 produced material is subject to a claim of privilege or other protection, the obligations of the  
13 receiving parties are those set forth in Federal Rule of Civil Procedure 26(b)(5)(B). This  
14 provision is not intended to modify whatever procedure may be established in an e-discovery  
15 order or agreement that provides for production without prior privilege review. The parties  
16 agree to the entry of a non-waiver order under Fed. R. Evid. 502(d) as set forth herein.

17           10.      NON TERMINATION AND RETURN OF DOCUMENTS

18           Within 60 days after the termination of this action, including all appeals, each receiving  
19 party must return all confidential material to the producing party, including all copies, extracts  
20 and summaries thereof. Alternatively, the parties may agree upon appropriate methods of  
21 destruction.

22           Notwithstanding this provision, counsel are entitled to retain one archival copy of all  
23 documents filed with the court, trial, deposition, and hearing transcripts, correspondence,  
24 deposition and trial exhibits, expert reports, attorney work product, and consultant and expert  
25 work product, even if such materials contain confidential material.

1 The confidentiality obligations imposed by this agreement shall remain in effect until a  
2 designating party agrees otherwise in writing or a court orders otherwise.

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(END OF DOCUMENT; SIGNATURE PAGES FOLLOW)



1  
2 IT IS SO STIPULATED, THROUGH COUNSEL OF RECORD.

3 Presented by:

4 DATED: April 4, 2018

PERKINS COIE LLP

5  
6 KELLEY, GOLDFARB, HUCK, ROTH  
& RIOJAS, PLLC

By: s/William C. Rava

William C. Rava, WSBA No. 29948  
1201 Third Avenue, Suite 4900  
Seattle, WA 98101-3099  
WRava@perkinscoie.com  
Telephone: 206.359.8000  
Facsimile: 206.359.9000

7 By: s/Kit W. Roth

8 Christopher M. Huck, WSBA No. 34104  
9 Kit W. Roth, WSBA No. 33059  
10 R. Omar Riojas, WSBA No. 35400  
700 Fifth Avenue, Suite 6100  
Seattle, WA 98104

MOSS & BARNETT

A Professional Association

11 huck@kelleygoldfarb.com

12 roth@kelleygoldfarb.com

13 riojas@kelleygoldfarb.com

Telephone: 206.452.0260

Facsimile: 206.397.3062

By: s/Terese A. West

David P. Jendrzejek, (*pro hac vice*)  
Terese A. West (*pro hac vice*)  
150 South Fifth Street, Suite 1200  
Minneapolis, MN 55402  
David.Jendrzejek@lawmoss.com  
West@lawmoss.com  
Telephone: 612.877.5000  
Facsimile: 612.877.5999

14 CAIRNCROSS & HEMPELMANN, P.S.

15 Ana-Maria Popp, WSBA No. 39614

16 E-mail: apopp@cairncross.com

17 Jeff Nelson WSBA No. 44570

E-mail: jnelson@cairncross.com

18 Binah B. Yeung WSBA No. 44065

E-mail: byeung@cairncross.com

524 Second Avenue, Suite 500

19 Seattle, WA 98104-2323

Telephone: (206) 587-0700

20 Facsimile: (206) 587-2308

Attorneys for Defendants

21 Attorneys for Plaintiff

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23  
24  
25  
26  
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Perkins Coie LLP  
1201 Third Avenue, Suite 4900  
Seattle, WA 98101-3099  
Phone: 206.359.8000  
Fax: 206.359.9000

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**PURSUANT TO STIPULATION, IT IS SO ORDERED.**

IT IS FURTHER ORDERED that, pursuant to Fed. R. Evid. 502(d), the production of any documents in this proceeding shall not, for the purposes of this proceeding or any other proceeding in any other court, constitute a waiver by the producing party of any privilege applicable to those documents, including the attorney-client privilege, attorney work-product protection, or any other privilege or protection recognized by law.

Dated this 10<sup>th</sup> day of April, 2018.



Robert S. Lasnik  
United States District Judge

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 Western District of Washington on [date] in the  
 case of *Marsha Linehan v. Lane Pederson and Cognitive Behavioral Specialties d/b/a*  
*Dialectical Behavior Therapy National Certification and Accreditation Association*, No. 2:17-  
 cv-01494 RSL. 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  
 Western District of Washington for the purpose of enforcing the terms of this Stipulated  
 Protective Order, even if such enforcement proceedings occur after termination of this action.

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

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

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

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