

ATTACHMENT 1  
(Rev'd 11/19/2025)

UNITED STATE DISTRICT COURT  
NORTHERN DISTRICT OF OHIO  
EASTERN DIVISION

	)	CASE NO.
	)	
Plaintiff(s),	)	JUDGE BRIDGET MEEHAN BRENNAN
	)	
v.	)	<b><u>REPORT OF PARTIES' PLANNING</u></b>
	)	<b><u>MEETING UNDER FED. R. CIV. P.</u></b>
Defendant(s).	)	<b><u>26(f) AND L.R. 16.3(b)(3)</u></b>
	)	
	)	

Pursuant to Fed. R. Civ. P. 26(f) and Local Rule 16.3(b)(3), a meeting was held on \_\_\_\_\_, and was attended by:

\_\_\_\_\_ counsel for plaintiff(s) \_\_\_\_\_

\_\_\_\_\_ counsel for defendant(s) \_\_\_\_\_

1. The parties:

\_\_\_\_\_ will exchange the initial disclosures required by Fed. R. Civ. P. 26(a)(1) no later than five (5) business days before the Case Management Conference per the Court's Notice of Case Management Conference and Order.

— *or* —

\_\_\_\_\_ have not been required to make initial disclosures pursuant to Rule 26(a)(1)(B) because this matter falls into the excepted category of \_\_\_\_\_.

ATTACHMENT 1  
(Rev'd 11/19/2025)

2. The parties recommend the following case designation:

Expedited \_\_\_\_\_

Standard \_\_\_\_\_

Complex \_\_\_\_\_

Administrative \_\_\_\_\_

Mass Tort \_\_\_\_\_

Pursuant to Local Rule 16.2(b), if the recommended track designation is expedited, standard, or complex, the factors supporting such recommendation are:

\_\_\_\_\_  
\_\_\_\_\_.

3. The parties have discussed whether this case is suitable for one or more of the following Alternative Dispute Resolution (“ADR”) mechanisms and inform the Court of their position as to the following options:

Early Neutral Evaluation \_\_\_\_\_

Mediation \_\_\_\_\_

Arbitration \_\_\_\_\_

Summary Jury Trial \_\_\_\_\_

Summary Bench Trial \_\_\_\_\_

Case not suitable for ADR \_\_\_\_\_

Case not suitable for ADR now, but may be after discovery \_\_\_\_\_

4. The parties [**do** \_\_\_/**do not** \_\_\_] consent to the jurisdiction of the United States Magistrate Judge pursuant to 28 U.S.C. § 636(c).

ATTACHMENT 1  
(Rev'd 11/19/2025)

5. With respect to electronically stored information, the parties: **[choose one]**

\_\_\_\_\_ agree to follow the default standard for discovery of electronically stored information (Appendix K to Northern District of Ohio Local Rules).

– *or* –

\_\_\_\_\_ will finalize an alternative agreement that sets out retention guidelines, search methodology, the format for production, and procedures for addressing attorney-work product or privileged information by \_\_\_\_\_.

6. The parties have discussed whether the Court should enter a protective order to facilitate discovery and state as follows: **[choose one]**

\_\_\_\_\_ agreed to the form protective order set forth in Appendix L to the Local Rules and will submit the proposed order to the Court no later than \_\_\_\_\_.

– *or* –

\_\_\_\_\_ will submit an alternative proposed protective order for the Court's consideration. Said proposed protective order will be submitted to the Court no later than \_\_\_\_\_ with an addendum setting forth the differences between the parties' proposed protective order and Appendix L to the Local Rules.

– *or* –

\_\_\_\_\_ disagree as to the necessity of a protective order.

– *or* –

\_\_\_\_\_ agree that a protective order is not necessary at this time.

ATTACHMENT 1  
(Rev'd 11/19/2025)

7. Recommended Discovery Plan:

- a. Describe the subjects on which discovery is to be sought, the nature and extent of discovery, and what discovery can be prioritized to facilitate early resolution:

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- b. State any discovery disputes or challenges anticipated by either party:

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- c. State any issues, include each parties' views and proposals on claims of privilege or of protection as trial-preparation materials, including the timing and method for complying with Rule 26(b)(5)(A) and – if the parties agree on a procedure – whether the parties will seek to include that agreement in an order under Federal Rule of Evidence 502: \_\_\_\_\_

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8. Proposed Deadlines

- a. Recommended deadline for amending pleadings and/or adding parties: \_\_\_\_\_
- b. Recommended fact discovery deadline: \_\_\_\_\_
- c. If expert discovery must be concluded prior to the submission of dispositive motions:

ATTACHMENT 1  
(Rev'd 11/19/2025)

Expert report(s) for party with the burden of proof due: \_\_\_\_\_

Responsive expert report(s) due: \_\_\_\_\_

Expert discovery deadline: \_\_\_\_\_

Recommended dispositive motion deadline: \_\_\_\_\_

- d. If expert discovery does not need to be concluded prior to the submission of dispositive motions:

Expert report(s) for party with the burden of proof due: \_\_\_\_\_

Responsive expert report(s) due: \_\_\_\_\_

Expert discovery deadline: \_\_\_\_\_

Recommended dispositive motion deadline: \_\_\_\_\_

- e. Recommended date for a telephonic status conference to be held at least one month in advance of the close of fact discovery: \_\_\_\_\_

- f. Other matters for the Court's attention: \_\_\_\_\_

\_\_\_\_\_

Attorney for Plaintiff(s) \_\_\_\_\_

\_\_\_\_\_

Attorney for Defendant(s) \_\_\_\_\_

\_\_\_\_\_