

JOINT INITIAL STATUS REPORT

1. Nature of the Case

- A. Identify the attorneys of record for each party, including the lead trial attorney.
- B. Identify any parties that have not yet been served.
- C. State the basis for federal jurisdiction. If jurisdiction over any claims is based on diversity or supplemental jurisdiction:
 - i. state whether/why the amount in controversy exceeds the jurisdictional threshold or whether there is a dispute regarding the amount in controversy (and, if so, the basis of that dispute), and
 - ii. identify the state of citizenship of each named party. For unincorporated associations, LLC's, partnerships and other business entities that are not corporations, the states in which any individual members of the business unit are citizens must be identified. Parties are reminded that individuals are citizens of the state where they are domiciled; that may or may not be the state where they currently reside. *See Heinen v. Northrop Grumman Corp.*, 671 F.3d 669 (7th Cir. 2012).

NOTE: The report must address whether there is diversity in any case in which pendent jurisdiction over state law claims is asserted, so that the Court may exercise informed discretion about whether to resolve such claims in the event that the federal question claims are resolved or dismissed.

- D. Generally describe the nature of the claims asserted in the complaint and any counterclaims.
- E. Describe the relief sought by the plaintiff(s).
- F. Briefly describe the major legal and factual issues in the case.

2. Case Plan

- A. Indicate whether there are any pending motions.
- B. State whether any defendant anticipates responding to the complaint by means of motion and, if so, the basis for the intended motion.
- C. Submit a proposed discovery plan, including the following information:
 - the general type of discovery needed,

- whether discovery will encompass electronically stored information (ESI) and any anticipated issues about disclosure or discovery of ESI, including the form or forms in which it should be produced;
- any issues about claims of privilege or of protection as trial-preparation materials, including—if the parties agree on a procedure to assert these claims after production—whether to ask the court to include their agreement in an order;
- the date on which Rule 26(a)(1) disclosures were made or will be made;
- the date by which the parties will complete fact discovery;
- whether expert discovery is contemplated and, if so, the dates by which Rule 26(a)(2) disclosures will be made and expert depositions completed;
- what changes, if any, should be made in the limitations on discovery imposed under the Federal Rules of Civil Procedure or by the Local Rules, such as changes in the number of depositions or interrogatories permitted; and
- the date by which the parties must file any dispositive motions.

D. With respect to trial, provide the following information:

- whether there is a jury demand, and
- an estimated length of trial.

3. **Settlement**

- A. State whether any settlement discussions have occurred and describe the status of any such settlement discussions. Do *not* provide the particulars of any demands/offers that have been made.
- B. State whether the parties believe that a settlement conference would be productive at this time.

4. **Consent to Proceed Before a Magistrate Judge**

- A. State whether counsel have informed their respective clients about the possibility of proceeding before the assigned Magistrate Judge for all purposes, including trial and entry of final judgment, and whether the parties unanimously consent to that procedure.