

## INITIAL STATUS REPORT

This case has been assigned to the calendar of Judge John Z. Lee. The parties are directed to meet pursuant to Federal Rule of Civil Procedure 26(f) and conduct a planning conference. At the planning conference, the parties must discuss the Mandatory Initial Discovery Pilot Project and their obligations thereto.

At least 4 business days prior to the initial status in this case, the parties are required to file a **joint initial status report** (with a courtesy copy to the Courtroom Deputy, room 1226), containing the following information:

### I. The Nature of the Case

- A. Identify the attorneys of record for each party, including the lead trial attorney.
- B. State the basis for federal jurisdiction.
  1. If diversity jurisdiction is the asserted basis for federal jurisdiction, any nongovernmental party, other than an individual or sole proprietorship, shall include the following information as required by Northern District of Illinois Local Rule 3.2:
    - a. In the case of a corporation, the citizenship of any entity owning more than 5% of the corporation.
    - b. In the case of a general partnership, joint venture, LLC, LLLP, or LLP, the citizenship of any member.
    - c. In the case of any other unincorporated association, the citizenship of any member.
    - d. A supplement to the statement of the basis for federal jurisdiction shall be filed within 14 days of any change in the information provided in the Initial Status Report.
  2. The initial status hearing may be stricken on the basis of a party's failure to comply with Judge Lee's requirements regarding the statement of the basis for federal jurisdiction.
- C. Describe the nature of the claims asserted in the complaint and any counterclaims.
- D. A statement of the major legal and factual issues in the case to be submitted by each side in 200 words or less per side. A party need not agree to the opposing party's statement.
- E. Describe the relief sought by the Plaintiff(s).

## **II. Pending Motions and Case Plan**

- A. Identify the day/date of the Initial Status Hearing (*e.g.*, Wednesday, June 25, 20XX).
- B. Identify all pending motions and the dates Answers were filed.
- C. Provide a description of the parties' discussions of the mandatory initial discovery responses required by the Mandatory Initial Discovery Pilot Project. The report should describe the resolution of any limitations invoked by any party in its response, as well as any unresolved limitations or other discovery issues. The parties shall attach the initial and supplemental responses and any other discovery requests, objections and responses involved in any unresolved limitations or discovery issues. During the Rule 26(f) conference, parties should discuss the mandatory initial discovery responses and seek to resolve any limitations they have made or intend to make.
- D. Submit a proposed discovery plan, including the following information:
  - 1. The general type of discovery needed;
  - 2. A date to issue written discovery;
  - 3. A date for the deadline for the amendment of pleadings (90 days after Rule 26(a) disclosures are exchanged).
  - 4. A fact discovery completion date;
  - 5. An expert discovery completion date, including dates for the delivery of expert reports; and
  - 6. A date for the filing of dispositive motions.
- E. With respect to trial, indicate the following:
  - 1. Whether a jury trial is requested and by whom; and
  - 2. The probable length of trial

## **III. Consent to Proceed Before a Magistrate Judge**

Indicate whether the parties consent unanimously to proceed before a Magistrate Judge.

## **IV. Status of Settlement Discussions**

- A. Indicate whether any settlement discussions have occurred;
- B. Describe the status of any settlement discussions; and
- C. Whether the parties request a settlement conference.