

SUPERIOR COURT OF ARIZONA  
MARICOPA COUNTY

CV 2014-094501

04/17/2015

HONORABLE DAVID M. TALAMANTE

CLERK OF THE COURT  
M. Kay  
Deputy

TANGLEWOOD H O A

JAMES PORTMAN WEBSTER

v.

HELEN OXFORD

J ROGER WOOD

ALTERNATIVE DISPUTE  
RESOLUTION - CCC

MINUTE ENTRY

Courtroom 207 – SEA

9:12 a.m. This is the time set for Telephonic Status Conference to consider the submission of a Joint Report and proposed Scheduling Order. Counsel, James Portman Webster, appears telephonically on behalf of Plaintiff. Counsel, J. Roger Wood, appears telephonically on behalf of Defendant.

A record of the proceeding is made by audio and/or videotape in lieu of a court reporter.

The Court has reviewed the case file and the pleadings filed by the parties.

Counsel address the Court regarding the status of this case.

**IT IS ORDERED** directing the parties to exchange initial or updated disclosure statements on or before **May 18, 2015**.

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Notwithstanding that Plaintiff stipulates to Defendant's Counterclaim, counsel request that the Court issue a Scheduling Order in this matter and refer the parties for a Settlement Conference through ADR. Accordingly,

**IT IS ORDERED** that the parties shall participate in a mandatory Settlement Conference. This case is referred to the Court's Alternative Dispute Resolution for the appointment of a judge pro tempore to conduct a settlement conference. Counsel and/or the parties will receive a minute entry from ADR appointing the judge pro tempore. Counsel and any "pro per" parties will contact the appointed judge pro tempore to arrange the date, time and location for the settlement conference. The judge pro tempore is requested to conduct a settlement conference not later than **July 16, 2015**. The Office of Alternative Dispute Resolution will not do the scheduling of the settlement conference so please do not contact that office.

All counsel and their clients, or non-lawyer representatives who have full and complete authority to settle the case, shall personally appear and participate in good faith in the Settlement Conference. Sanctions may be imposed for failure to participate.

**IT IS FURTHER ORDERED** as follows:

Counsel and/or the parties are to meet personally to discuss all of the matters set forth in Rule 16(b), Ariz. R. Civ. P. Counsel and/or the parties shall prepare and file with the Court, no later than **5:00 p.m. on June 1, 2015**, a Joint Report and proposed Scheduling Order, for discovery, motion and disclosure deadlines.

If the parties agree to the dates, they should prepare an Order **in the form attached hereto**, containing the provisions which are applicable to their case. For example, paragraph one of the Order set forth below need not be included in the parties' proposed Order if the parties intend to disclose their experts' identity and opinions at the same time they disclose their experts' areas of testimony. Similarly, if the parties agree to simultaneously disclose the identity and opinions of their expert witnesses, they need not include in their proposed Order the language set forth in paragraph 2a. and b., below.

The proposed Order shall include specific dates (01/01/2015 rather than 45 days from close of discovery). Do not incorporate a firm trial date in the proposed Order.

If counsel are unable to agree on any of the items that are to be included in the Order, the reasons for their inability to agree shall be set forth in their proposed Order.

The Court will review the proposed Scheduling Order. If all is in order, the Court will set a status conference close to the discovery cutoff date. At the status conference, if the parties

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have completed discovery and are ready for trial, the Court will set firm dates for the final pretrial management conference and the trial. If the parties are not ready for trial, the matter may be placed on the Dismissal Calendar for dismissal within 60 days.

If counsel feel a pretrial conference is still necessary at this stage of the litigation, they should address the reasons why in the first paragraph of the proposed Scheduling Order.

If a Joint proposed Scheduling Order is not timely submitted, the Court will place the matter on the Dismissal Calendar.

**[PROPOSED] SCHEDULING ORDER**

The Court has reviewed the parties' Joint Proposed Scheduling Order and adopts and/or modifies the days as follows:

**IT IS ORDERED** as follows:

1. The parties shall mutually and simultaneously disclose areas of expert testimony by **5:00 p.m. on \_\_\_\_\_, 2015.** [or]
  - a. Plaintiffs shall disclose areas of expert testimony by **5:00 p.m. on \_\_\_\_\_, 2015.**
  - b. Defendants shall disclose areas of expert testimony by **5:00 p.m. on \_\_\_\_\_, 2015.**
2. The parties shall mutually and simultaneously disclose the identity and opinions of their expert witnesses by **5:00 p.m. on \_\_\_\_\_, 2015.** [or]
  - a. Plaintiffs shall disclose the identity and opinions of their expert witnesses by **5:00 p.m. on \_\_\_\_\_, 2015.**
  - b. Defendants shall disclose the identity and opinions of their expert witnesses by **5:00 p.m. on \_\_\_\_\_, 2015.**
3. Any and all discovery requests shall be served by **5:00 p.m. on \_\_\_\_\_, 2015.**
4. The parties shall disclose all non-expert witnesses by **5:00 p.m. on \_\_\_\_\_, 2015.** [or]

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- a. Plaintiffs shall disclose areas of non-expert testimony by **5:00 p.m. on \_\_\_\_\_, 2015.**
- b. Defendants shall disclose areas of non-expert testimony by **5:00 p.m. on \_\_\_\_\_, 2015.**
5. The parties shall mutually and simultaneously disclose their rebuttal expert witnesses and opinions by **5:00 p.m. on \_\_\_\_\_, 2015.**
6. All discovery shall be concluded by **5:00 p.m. on \_\_\_\_\_, 2015.**
7. The parties shall have exchanged up-to-date final Rule 26.1 Supplemental Disclosure Statements by **5:00 p.m. on \_\_\_\_\_, 2015.** This Order does not replace the parties' obligation to seasonably disclose on an on-going basis under Rule 26.1 as information becomes available.
8. Settlement conference (choose one):

The parties shall participate in private mediation by **5:00 p.m. on \_\_\_\_\_, 2015;**

**OR**

The parties shall participate in a mandatory Settlement Conference. This case is referred to the Court's Alternative Dispute Resolution for the appointment of a judge *pro tempore* to conduct a settlement conference. Counsel and/or the parties will receive a minute entry from ADR appointing the judge *pro tempore*. Counsel and any "pro per" parties will contact the appointed judge *pro tempore* to arrange the date, time, and location for the settlement conference. The judge *pro tempore* is requested to conduct a settlement conference not later than **(at least 90 days out), 2015.** The Office of Alternative Dispute Resolution will not do the scheduling of the settlement conference so please do not contact that office. If counsel prefer to use a private mediator to conduct the Settlement Conference, a Stipulation and Order re: Alternative to ADR must be presented to the Court by **5:00 p.m. on \_\_\_\_\_, 2015.**

**All counsel and their clients, or non-lawyer representatives who have full and complete authority to settle the case, shall personally appear and participate in good faith in the Settlement Conference. Sanctions may be imposed for failure to participate.**

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9. No expert witnesses, expert opinions, lay witnesses, or exhibits shall be used at trial other than those disclosed in a timely manner, except for good cause shown or written agreement of the parties.
10. All pretrial motions, other than motions *in limine*, must be filed by **5:00 p.m. on \_\_\_\_\_, 2015.**
11. A **Telephonic Pretrial Status/Scheduling Conference** is set for \_\_\_\_\_, 2015 at \_\_\_\_\_ a.m./p.m. (the Court will set this hearing date) for the purpose of assigning a trial date if the case has not settled. Counsel shall have their trial calendars available. Counsel for Plaintiff shall initiate the telephonic conference by first arranging the presence of all other counsel on the conference call and by calling this division at: **(602) 506-6251** promptly at the scheduled time.

**NOTE: This Court utilizes FTR for an electronic record of the proceedings. However, any party may request the presence of a court reporter by contacting the division three (3) court business days before the scheduled hearing.**

12. Should any discovery disputes arise, counsel, prior to filing discovery motions, shall meet and confer pursuant to Rule 37, Ariz.R.Civ.P.
13. The dates set forth in this Order are FIRM dates and will not be extended or modified by this Court absent good cause. Lack of preparation will not ordinarily be considered good cause.

Dated: \_\_\_\_\_

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HONORABLE DAVID M. TALAMANTE  
JUDICIAL OFFICER OF THE SUPERIOR COURT

9:16 a.m. Conference concludes.