

JUDICIAL SETTLEMENT CONFERENCE PROGRAM

Checklist for Lawyers

When Judge Decides to Order Case to a Judicial Settlement Conference:

_____ Parties agree on a settlement judge from the master list (if the parties cannot agree on a judge, the court will choose a settlement judge). Parties are asked to choose a judge located within 100 miles of the settlement conference site when possible.

For [Judicial Settlement Conference Program Judges](#)

_____ Parties inform the referring circuit court judge of their selection.

Once the Settlement Judge is Identified:

_____ Counsel **must** prepare a confidential pre-conference brief of **no more than 5 pages** for the settlement judge that may include:

_____ a brief statement of the facts;

_____ a list of damages (plaintiff only);

_____ a concise theory of liability (plaintiff only);

_____ defenses to plaintiff's liability theory (defendant only);

_____ a statement describing the settlement history of the case, including all demands, settlement offers, and counter-offers with their corresponding dates;

_____ the trial date and expected length of trial, and

_____ a list identifying the parties who will attend the conference.

The Pre-Settlement Conference Call:

_____ Contact the settlement judge to schedule a phone conference in advance of the settlement conference.

_____ Verify with settlement judge the date, time, and location of the settlement conference.

_____ Ensure that parties with settlement authority will attend the settlement conference.

At the Settlement Conference:

- _____ At the beginning of the settlement conference, counsel and the settlement judge should sign the Agreement Concerning Settlement Conference Form, which addresses confidentiality.
- _____ If the case settles, the parties will inform the referring circuit court in writing.
- _____ At the conclusion of the settlement conference, parties will complete exit surveys.