

ENERGY MEDIATION CENTER

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MEDIATION INTAKE FORM

You should feel free to skip any questions that you believe are inapplicable at this time. In addition, you are encouraged to provide any additional information you deem necessary or relevant, including a stand-alone pre-mediation statement. Use extra sheets of paper whenever necessary or convenient.

Confidentiality. As with all communications received by us during the pre-mediation process, all information will be treated with strict confidentiality, and will not be divulged to anyone without your specific permission.



Full style of case:

Trial date:

Have all necessary parties been joined? Yes No

If no, please explain:

How many (total) separate caucus/breakout rooms will be required? 1 2 3 4 5 6

Have there been any settlements with parties that are not involved in the mediation? Yes No

If yes, please identify the parties and the nature of the settlement with each:

Either provide copies of demands and offers exchanged between the parties, or state them below:

Is this mediation mandated by a court? Yes No

Has this matter been mediated previously? Yes No

If yes, why is this matter being mediated again? What circumstances, if any, have changed since the last mediation?

Briefly describe the dispute below:

State the relief sought by each party (for example, injunctive relief, actual or punitive damages, attorneys' fees, etc.):

If a party is seeking damages, state the total monetary amount sought, and include a breakdown of the amounts sought for each category of damages:

Will a person with authority to fully bind the parties to a settlement attend the mediation? Yes No

If no, please identify the person whose signature or authority is necessary, and the reason(s) why such person will not be in attendance:

What is the status of discovery in this case? None/minimal Some Substantially complete

What, if any, discovery not already completed do you believe should be conducted prior to mediation?

Are there any motions pending that may have some bearing on the settlement negotiations? Yes No

If yes, please explain:

Will you need any special audio or visual equipment at the mediation? Yes No

If yes, please explain:

Describe any other information or issues that may be relevant to the mediation:

If this case cannot be settled at mediation, describe any narrowing of legal issues that can be accomplished at mediation (e.g., pre-trial matters that could be agreed upon at mediation, or any discovery disputes that could be addressed):

Please indicate special dietary needs or accommodations:

Separately for each party, in the space provided below (attach extra sheets as necessary), state the following:

- ① Party name
- ② Party's role (plaintiff, defendant, intervenor, etc.)
- ③ Party's attorney
- ④ Party's client representative