

**SAMPLE LITIGATION BUDGET WORKSHEET (Outside counsel may use their own form)**

MATTER CAPTION: \_\_\_\_\_

CAUSE NO.: \_\_\_\_\_

**STAFFING:** List the full name(s) of the assigned staff members as allowed in the Outside Counsel Guidelines "Staffing Section", ie. one partner, one associate and one paralegal unless advance permission is requested.

\_\_\_\_\_ partner

\_\_\_\_\_ associate

\_\_\_\_\_ paralegal

Include fees, expenses, and total for each line and a subtotal for each section.

**PHASE I: Investigation and Initial Pleadings**

- Legal fees and expenses to be incurred from the date this matter is referred to Outside Counsel up to date of filing of the initial complaint or answer.
- Investigation & Analysis
- Settlement Negotiations
- Complaint/Original Petition/Answer:
  - Research: \$ \_\_\_\_\_
  - Drafting: \$ \_\_\_\_\_
  - Argument: \$ \_\_\_\_\_
- Other (Specify): \_\_\_\_\_

Estimated Hours for Completion: \_\_\_\_\_

**PHASE I - TOTAL \$** \_\_\_\_\_

**PHASE II: Responsive Pleadings, Motions, Discovery, Legal Fees, and Expenses (to be incurred from the date of filing of the initial complaint to the discovery cutoff date)**

- Settlement Negotiations
- Motions:
  - Research: \$ \_\_\_\_\_
  - Drafting: \$ \_\_\_\_\_
  - Argument: \$ \_\_\_\_\_
    - Default Judgment
    - Dismissal
    - Summary
    - Judgment
    - Other \_\_\_\_\_
- Opposition to (or) Motion to Amend Pleadings:
  - Research: \$ \_\_\_\_\_
  - Drafting: \$ \_\_\_\_\_
  - Argument: \$ \_\_\_\_\_
- Interrogatories/Requests for Admissions
- Response to Interrogatories/Requests
- Discovery Motions (i.e. Protective Order, Compel)
- Depositions (including witness preparation/identify deponents)
- Transcription or Other Review
- Interview/Designation of Expert Witnesses
- Court Ordered Status Conference
- Other (Specify): \_\_\_\_\_

Estimated Hours for Completion: \_\_\_\_\_

**PHASE II - TOTAL \$ \_\_\_\_\_**

**PHASE III: Pretrial/Trial Preparation. Legal fees and expenses to be incurred from the discovery cutoff date until the first day of trial.**

- Settlement Negotiations
- Docket Call
- Pretrial Motions and Replies (Specify):  
\_\_\_\_\_
- Research: \$ \_\_\_\_\_
- Drafting: \$ \_\_\_\_\_
- Argument: \$ \_\_\_\_\_
- Pretrial Conference
- Pretrial Order (including preparation of witnesses and exhibits lists)
  - Research: \$ \_\_\_\_\_
  - Drafting: \$ \_\_\_\_\_
- Trial Brief
  - Research: \$ \_\_\_\_\_
  - Drafting: \$ \_\_\_\_\_
  - Argument: \$ \_\_\_\_\_
- Preparation of Experts/Witnesses
- Jury Instructions
- Other (Specify): \_\_\_\_\_

Estimated Hours for Completion: \_\_\_\_\_

**PHASE III – TOTAL \$ \_\_\_\_\_**

**PHASE IV: Trial. Legal fees and expenses to be incurred from the date the trial commences through the entry of final judgment.**

- Settlement Negotiations
- Estimated Number of Trial Days: \_\_\_\_\_
- Trial Fees (aggregate)
  - Partners: \$ \_\_\_\_\_
  - Associates: \$ \_\_\_\_\_
  - Paralegals: \$ \_\_\_\_\_
- Expert/Witness Fees and/or Expenses
- Jury Selection
- Responses to (or) Motions for Directed/Instructed Verdict and/or Judgment Notwithstanding the Verdict:
  - Research: \$ \_\_\_\_\_
  - Drafting: \$ \_\_\_\_\_
  - Argument: \$ \_\_\_\_\_
  - Other (Specify): \_\_\_\_\_

Estimated Hours for Completion: \_\_\_\_\_

**PHASE IV – TOTAL \$ \_\_\_\_\_**

**PHASE V: Post-Trial. Legal fees and expenses to be incurred after the entry of final judgment, but excluding any appellate actions.**

- Settlement Negotiations
- Response to (or) Motion for New Trial
  - Research: \$ \_\_\_\_\_
  - Drafting: \$ \_\_\_\_\_
  - Argument: \$ \_\_\_\_\_
- Prepare Judgment or Order
- Transcript or Other Review
- Attorney Opinion Letter (whether to appeal or respond to appeal)
- Writ of Execution (preparation and filing)
- Other Execution (Specify): \_\_\_\_\_
- Post Judgment Interrogatories
- Post Judgment Depositions
- Other (Specify): \_\_\_\_\_

Estimated Hours for Completion: \_\_\_\_\_

**PHASE IV – TOTAL \$ \_\_\_\_\_**

**GRAND TOTAL OF ALL LITIGATION PHASES – TOTAL \$ \_\_\_\_\_**

## **Contact Information**

### **Main Office**

Maricopa Community College District  
2411 West 14th Street  
Tempe, AZ 85281

### **Office of General Counsel**

Janice Falkenberg  
General Counsel  
480-731-8878 P | 480-731-8890 F  
janice.falkenberg@domail.maricopa.edu

Lori Herigstad  
Senior Paralegal  
480-731-8877 P | 480-731-8890 F  
lori.herigstad@domail.maricopa.edu

### **MCCCD Risk Management**

Sheri Swain  
Risk Manager  
480-731-8879 P | 480-731-8890 F  
sheri.swain@domail.maricopa.edu