**BIRD Proposal Template**

### Cover Page

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **To**: Israel-U.S. Binational Industrial Research and Development Foundation   **From**: Israeli Company (**as appears in the Certificate of Incorporation)**  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  **Insert IS Co. Name**   |  |  | | --- | --- | | Office Address - | Mailing Address - | |  |  | |  |  | | \* Telephone No. | |   \* An Israeli address and telephone number are mandatory  **From**: U.S. Company (**as appears in the Certificate of Incorporation)**  **Insert U.S. Co. Name**  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   |  |  | | --- | --- | | Office Address - | Mailing Address - | |  |  | |  |  | | \* Telephone No. | |   \* A U.S. address and telephone number are mandatory   |  |  | | --- | --- | | **Project Title:** |  |   **Project Duration:** \_\_\_\_\_\_\_months **Project Budget: $** \_\_\_\_\_\_\_\_ (1)     |  |  |  | | --- | --- | --- | | Submitted by: | **Israeli Company**  **Authorized Company Official** | **U.S. Company**  **Authorized Company Official** | | Signature: |  |  | | Printed Name: |  |  | | Title: |  |  | | E-mail: |  |  | | Date Submitted: |  |  | |

ALL THE REQUESTED INFORMATION IS MANDATORY

1. Project Budget – must match the sum of the companies' budgets as presented in the proposal.

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### Proposal Table of Contents (including page numbers)

### Executive Summary (Up to 5 pages)

Please insert the updated Executive Summary of the Project and ensure that the information of the project title, project duration, and project budget is up to date. ***You are welcome to revise the Executive Summary with any new details, insights, or updates gathered during the proposal preparation period****. (No need to include the signatures of authorized company officials again).*

### The Innovation (Up to 7 pages)

This section expands the Innovation section described in the Executive Summary.

Preferably, it should address the following issues: Preferably the section should address:

**1**. **Current State and Limitations:** Describe how things are currently done, the state-of-the-art technologies in the target market, and the limitations of these technologies. Highlight shortcomings as a prelude to presenting your innovation.

**2. Product Concept**: Explain the product concept, supported by sketches, diagrams, and tables. Show how the innovation overcomes current limitations and provide validation results to demonstrate feasibility. Highlight its uniqueness and potential for market success.

**3**. **Patent Status:** Detail the background patents, potential new patents, and landscape.

**4**. **Regulatory and Technical Standards:** Identify relevant standards and confirm if the product meets current and emerging requirements.

**5**. **Government Funding and Obligations**: Indicate if the innovation received support from agencies like the Israel Innovation Authority, NIH, or others, and specify any obligations to such agencies.

### Proposed Project Execution

Please follow the instructions found in the Proposal Preparation Guidelines: <https://www.birdf.com/wp-content/uploads/2024/10/Proposal-Preparation-Guidelines-1024.pdf>

#### E.1. R&D Program

#### E.2. Project Execution Strategy

|  |  |
| --- | --- |
| **Line 1:** | Task # should be the same as in the Excel Budgets (Section L) of both Companies and as in the Program Plan (GANTT) (Section F). |
| **Line 2:** | Task name should be the same as in the Excel Budgets (Section L) of both Companies and as in the Program Plan (GANTT) (Section F). The name should not be longer than 40 characters. |
| **Line 3:** | Mark with an “x” which Company is taking part in the task. A company participating in a given task should have a budget for the task (Line 7, below). |
| **Line 4:** | Task duration should be the number of days between the start and end dates of the task and should be given in whole numbers. It should be the same as in the Excel Budgets (Section L) of both Companies and as in the Program Plan (GANTT) (Section F). |
| **Line 5:** | The start and end dates of the task should be given in a DD/MM/YY format and should be the same as in the Excel Budgets (Section L) of both Companies and as in the Program Plan (GANTT) (Section F). |
| **Line 6:** | Insert the name of the US and the IL Cos. (fill it out once for all task tables). |
| **Line 7:** | The task budgets for each Company should be extracted directly from the “Tasks Report” tab in the Excel Budget of each Co. and should be given in units of K$. |
| **Line 8:** | Insert the % of the total task budget attributed to each Co. (derived from Line 7). |
| **Line 9:** | Describe the overall objective / goal of the task, in 1-3 sentences. |
| **Line 10:** | Provide a textual description (no size restriction) of the main task activities. |
| **Line 11:** | Insert which milestone(s) are to be reached in this task, as given in the  “**Milestones and Deliverables Form**” (found at the end of this section). |
| **Line 12:** | Insert which deliverable(s) are to be provided in this task, as given in the  “**Milestones and Deliverables Form**” (found at the end of this section). |

**Detailed Task Description Form**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 1. | **Task #** |  | | |
| 2. | **Task name** |  | | |
| 3. | **Company taking part in task (mark with “x”)** | **IL:** | **US:** | **Both:** |
| 4. | **Task duration (days)** |  | | |
| 5. | **Start date (DD/MM/YY)** |  | **End date (DD/MM/YY):** |  |
| 6. | **Company name:** | **IL:** | **US:** |  |
| 7. | **Task budget (K$):** |  |  | **Total:** |
| 8. | **Task budget  (% of total):** | **%** | **%** | **100%** |
| 9. | **Objective of task:** |  | | |
| 10. | **Task Description:**  (no restriction on size) |  | | |
| 11. | **Milestone(s)  to be reached:** |  |  |  |
| 12. | **Deliverable(s)  to be provided:** |  |  |  |

**Milestones and Deliverables Form**

|  |  |  |
| --- | --- | --- |
| **#** | **Milestone Definition / Description and how it will be Measured** | **Milestone Date (MM/YY)** |
| 1 |  |  |
| 2 |  |  |
| 3 |  |  |
| 4 |  |  |
| 5 |  |  |
| **#** | **Deliverable Definition & Description** | **Deliverable Date (MM/YY)** |
| 1 |  |  |
| 2 |  |  |
| 3 |  | [end of project] |

**E.3** Analysis of the Project’s TRL (Up to 2 pages)

|  |  |
| --- | --- |
| Identify Project’s TRL prior to the Project Inception | Examples substantiating the project’s TRL prior to Project Inception |
| (Provide here the current TRL) | (Free text explaining your choice) |
|  | (Examples of achievements that were accomplished prior to the project’s inception that will support your choice) – Example 1 |
|  | (Examples of achievements that were accomplished prior to the project’s inception that will support your choice) – Example 2 |

|  |  |
| --- | --- |
| Expected Project’s TRL by the Project Completion | Examples substantiating the project’s expected TRL by the Project’s Completion (based on the Goals and Deliverables provided in section E.2) |
| (Provide here the expected TRL) | (Free text explaining your prediction) |
|  | (Example of Goals and Deliverables from Section E.2 that will support your prediction) – Example 1 |
|  | (Example of Goals and Deliverables from Section E.2 that will support your prediction) – Example 2 |

### Program Plan - Graphical Form (Up to 2 pages)

The Program Plan should consist of a chronological schedule of program activities**,** defined as detailed tasks and presented in graphical form (GANTT chart). The following guidelines should be followed in preparing the GANTT chart:

1. The tasks in the GANTT chart should coincide with the assigned number, name, start date and finish date, defined in item 4 of Section E.2. (above) and in the companies’ budgets (section L, ahead).
2. Task responsibility - for each task, show graphically which of the two companies will be responsible for its execution. Since both companies can share responsibility to execute the same task, show this graphically as well.
3. The Program Plan (GANTT) should encompass the entire duration of the Project.
4. The time axis of the GANTT chart should have a resolution not less than quarters but not more than months.

### The Market - (Up to 3 pages)

### Commercialization – Plans and Prospects - (Up to 3 pages) H.1. Product Manufacturing, Marketing, Sales Activities and Resources

### Economic and Social Impact and Cooperation – (Up to 2 pages) I.1. Economic Impact I.2. Social Impact I.3 Cooperation between the Companies and Risk/Revenue/Profit Sharing

### The Companies and their Resources – (Up to 2 pages)

### Organizations (Up to 3 pages)

### Budget

Each company should upload its budget (Excel file) using BIRD’s upload system: <https://www.birdf.com/upload-system/>.

**Israeli partner Total Budget** = ($)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**U.S. partner's Total Budget** = ($) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Total Project Budget** = ($)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Please note:** Neither partner's portion in the combined budget can be less than 30% of the total.

### Risk Analysis

**RISK ANALYSIS TABLES**

Do not change format (color & font size)

**TABLE 1A**

|  |  |  |
| --- | --- | --- |
| **Impact** | | |
| Risk # | Name/Description | Ranking | Duration**1** | Budget**2** | Commercialization Potential**3** |
| 1 |  |  |  |  |  |
| 2 |  |  |  |  |  |
| 3 |  |  |  |  |  |
| 4 |  |  |  |  |  |
| 5 |  |  |  |  |  |

**TABLE 1B**

|  |  |  |
| --- | --- | --- |
| Risk # | Name/Description | Type**\*** |
| 1 |  |  |
| 2 |  |  |
| 3 |  |  |
| 4 |  |  |
| 5 |  |  |

**\***Type: Technical (T), Project Management/Resources (M), External to the Project (E)

|  |  |
| --- | --- |
| **Ranking** | **Probability of Risk Occurring** |
| High | Above 50% |
| Medium | 30 – 49% |
| Low | 10 – 29% |
| Very Low | 1 – 10% |

|  |  |
| --- | --- |
| **Impact** | **Duration1** |
| High | Above 6 months |
| Medium | 3 to 6 months |
| Low | Below 3 months |

|  |  |
| --- | --- |
| **Impact** | **Budget2** |
| High | Above 20% increase |
| Medium | 10% to 20% increase |
| Low | Below 10% increase |

|  |  |
| --- | --- |
| **Impact** | **Commercialization Potential3** |
| High | Above 50% |
| Medium | 30% to 50% |
| Low | 1% to 29% |

**1. Duration of project extended by the given amount**

**2. Cost of project increases by the given percentage**

1. **Forecasted sales in the next 3 or 5 years reduced by the given percentage**

### Sundry Information – Mandatory

**Israeli Company**

Project Manager

|  |  |
| --- | --- |
| Full name and title: |  |
| Position in company: |  |
| Email address: |  |
| Direct number: |  |
| Mobile number: |  |

Fiscal Information Official

|  |  |
| --- | --- |
| Full name and title: |  |
| Position in company: |  |
| Email address: |  |
| Direct number: |  |
| Mobile number: |  |

**U.S. Company**

Project Manager

|  |  |
| --- | --- |
| Full name and title: |  |
| Position in company: |  |
| Email address: |  |
| Direct number: |  |
| Mobile number: |  |

Fiscal Information Official

|  |  |
| --- | --- |
| Full name and title: |  |
| Position in company: |  |
| Email address: |  |
| Direct number: |  |
| Mobile number: |  |