

BIRD Foundation

Technical Reporting

Given to New Grantees of the BIRD Foundation

May, 2023



Israel-United States Binational Industrial Research and Development Foundation

www.birdf.com

Reporting Objectives

Objectives:

- Monitor project progress. Actual Vs. Planned
- Put us all on the same page and assist you making better decisions

Potential Gains:

- Identify delays – Project extension
- Optimize your grant utilization

We want you to succeed



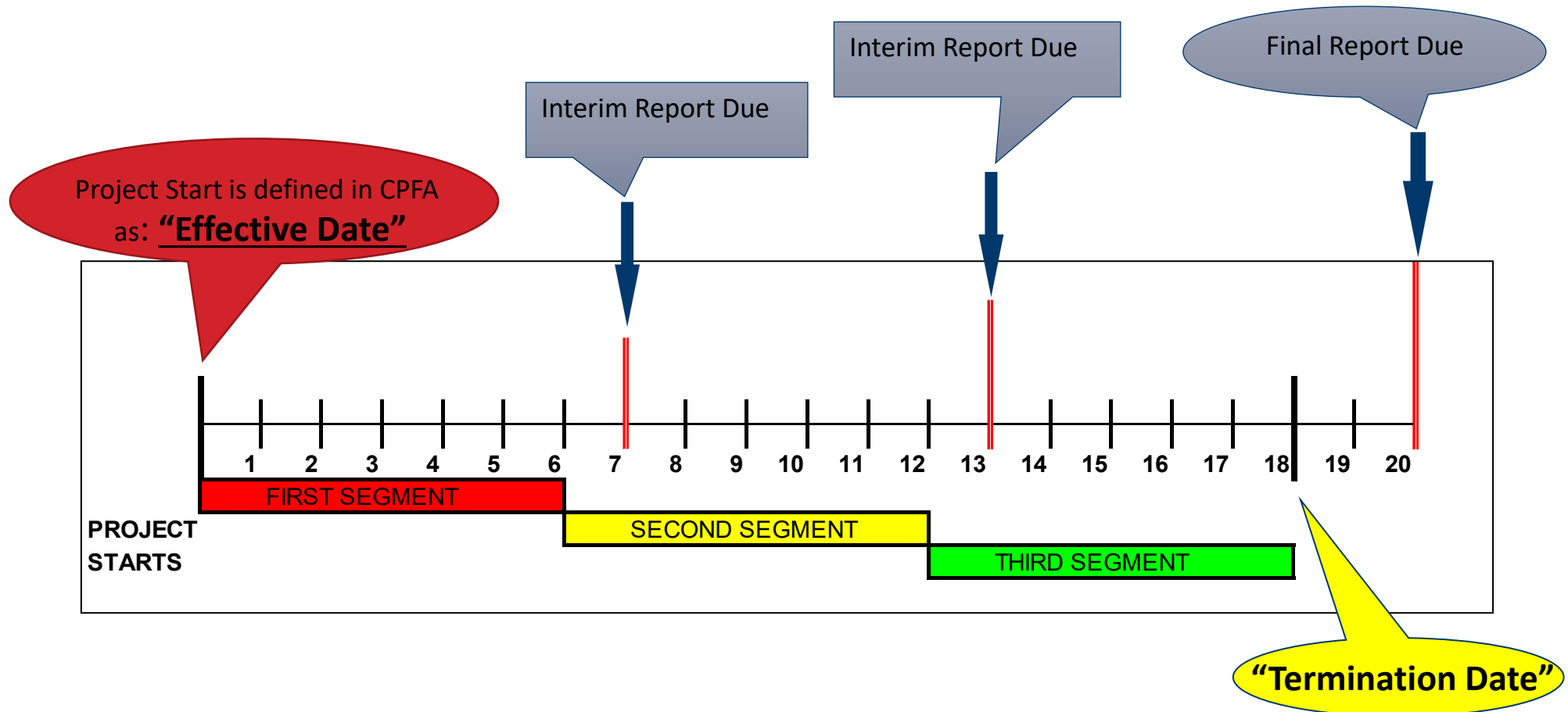
Reporting Process & Review

- Project segments division (usually of 6 months (CPFA))
- **Technical and Fiscal reports** - End of each segment - After 30 days
- **Technical** – Co-signed and Jointly submitted.
- **Fiscal** – submitted separately by each company.
- **Upload system & Hard Copies**

Make sure that the period dates on the technical and fiscal reports are the same!

- PBC & Finance team review the reports -> E-meeting
- Approval of the reports by BIRD is a **prerequisite** for continued funding of the project
- **End of Project – Technical final report and Fiscal report** should be submitted within 60 days following project termination.

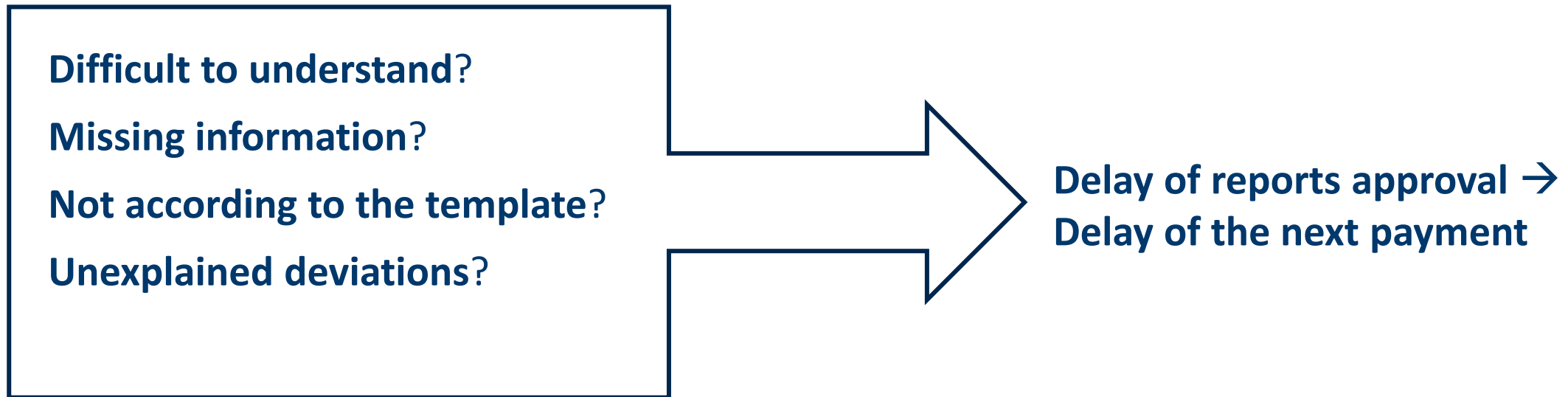
Reporting Schedule - Example



Reports: General Guidelines

- Prepare the reports **“By The Book” - Reporting Guidelines Booklet**
- A comprehensible **Technical Report templates – Read and Follow the instructions!**

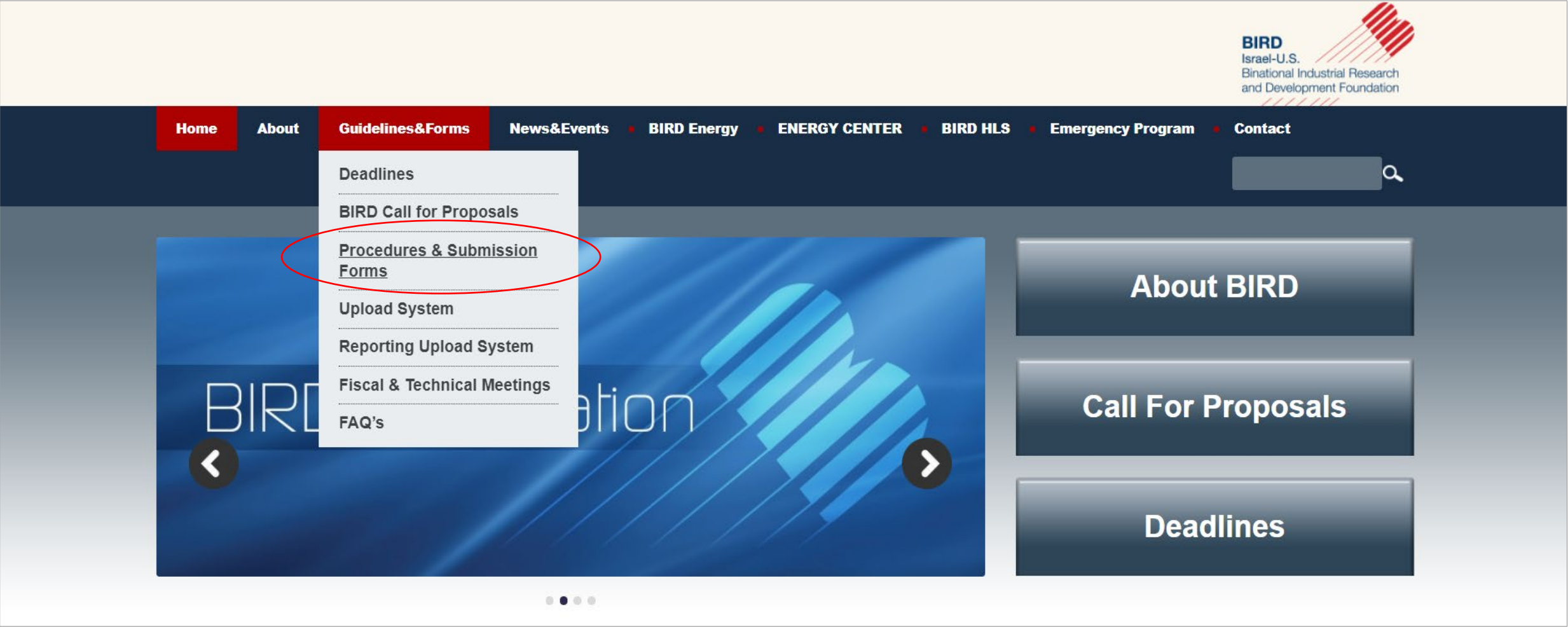
Keep the reporting simple and comprehensible - Acronyms or abbreviations? → Glossary of terms



Documents on BIRD's Website (www.birdf.com)



Guidelines & Forms → Procedures & Submission Forms



Reporting Documents on BIRD's Website

Guidelines & Forms → Procedures & Submission Forms -> Reporting Procedures & Forms

[Home](#) • [About](#) • [Guidelines&Forms](#) • [News&Events](#) • [BIRD Energy](#) • [ENERGY CENTER](#) • [BIRD HLS](#) • [BIRD Cyber](#) • [Contact](#)



Guidelines&Forms

BIRD Reporting Forms

- ♦ General Guidelines
- ♦ Interim Report
- ♦ Final Report
- ♦ Following Completion Reports

[Submission Forms](#)

Guidelines&Forms

Reporting Procedures and Forms

Reporting Guidelines

Report Formats [\(pdf\)](#)

Interim Report

Interim Technical Report Template [\(docx\)](#)

Fiscal Report [\(xls\)](#)

Final Report

a. Final Technical Report Template- Part I [\(docx\)](#)

b. Final Technical Report Template- Part II [\(xls\)](#)

Explanations to Part II [\(YouTube\)](#)

c. Fiscal Report [\(xls\)](#)

Technical Reports: Content

Report Cover Page

Make sure that the
report is signed by
both companies

Interim Technical Report Cover Page

BIRD Ref. No.:

To: Israel-U.S. Binational Industrial Research and Development Foundation

Project Title:

Submitted by:

Israeli Company:

U.S. Company:

Type of Report: Interim - Segment # :

Project Effective Date (Start Date DD/MM/YY):

Project Termination Date (End Date DD/MM/YY):

Dates of Reporting Segment Covered (DD/MM): from to

Signatures:

Project Manager:	Israeli Company	U.S. Company
Printed Name:	<input type="text"/>	<input type="text"/>
Title:	<input type="text"/>	<input type="text"/>
E-mail:	<input type="text"/>	<input type="text"/>
Telephone no.:	<input type="text"/>	<input type="text"/>

Signatures:

Authorized Company Official:	Israeli Company	U.S. Company
Printed Name:	<input type="text"/>	<input type="text"/>
Title:	<input type="text"/>	<input type="text"/>
E-mail:	<input type="text"/>	<input type="text"/>
Telephone no.:	<input type="text"/>	<input type="text"/>

Date Submitted (DD/MM/YY):



Image by Arek Socha from Pixabay

Technical Reports: Content

1. Table of Contents

Contents

1. Table of Contents	2
2. Objectives and Work Performed During the Segment	3
3. Summary of Accomplishments	3
4. Results - Summary of Milestones and Deliverables	3
5. Plans for the Next Project Segment	5
6. Graphical Comparison of Actual/Planned Activities Versus Program Plan	6
7. Cooperation Between the Companies	6
8. Risk Analysis	7
9. Market and Commercialization Plans	9
10. Published Material	9
Appendices (Use as needed)	9

Final Technical Report

Divided into 2 parts: Part I – Word Doc. - Part II - EXCEL Doc. – Marketing Forecast

Part I: Almost the same as in Interim Report

2 new sections are prepared utilizing a dedicated Excel File

Section 11 - Updated Market Forecast

Section 12 – Summary of Market Size

} Final Report Part II (Excel file)

Appendix – Project Summary Presentation



Final Technical Report

Final Technical Report – Part II (Excel File) – YouTube

[Home](#) • [About](#) • [Guidelines&Forms](#) • [News&Events](#) • [BIRD Energy](#) • [ENERGY CENTER](#) • [BIRD HLS](#) • [BIRD Cyber](#) • [Contact](#)



Guidelines&Forms

BIRD Reporting Forms

- ◆ General Guidelines
- ◆ Interim Report
- ◆ Final Report
- ◆ Following Completion Reports

[Submission Forms](#)

Guidelines&Forms

Reporting Procedures and Forms

Reporting Guidelines

Report Formats [\(pdf\)](#)

Interim Report

Interim Technical Report Template [\(docx\)](#)

Fiscal Report [\(xls\)](#)

Final Report

a. Final Technical Report Template- Part I [\(docx\)](#)

b. Final Technical Report Template- Part II [\(xls\)](#)

Explanations to Part II [\(YouTube\)](#)

c. Fiscal Report [\(xls\)](#)

Reports Submission: Upload System

Home

About

Guidelines&Forms

News&Events

BIRD Energy

ENERGY CENTER

BIRD HLS

Emergency Program

Contact

Deadlines

BIRD Call for Proposals

Procedures & Submission

Forms

Upload System

Reporting Upload System

Fiscal & Technical Seminars

FAQ's

Guidelines

Deadlines

BIRD Call for Pr

Procedures & S

Forms

Upload System

Reporting Uploa

Fiscal & Technic

Seminars

FAQ's

Guidelines&Forms

ing Upload System

BIRD Foundation

Report Upload and Management System – Reporting Documents

Upload WEBSITE: <https://upload.birdf.com>

on to the system you need to use the same username and password used when

submitting the Executive Summary and Proposal files in the BIRD upload system.

If you have forgotten your password, click on the link "forgot password" and it will be sent to the e-mail

registered. For username recovery request, please contact Maha, at maha@birdf.com.

Login / Create new account

Username

Password

Reports Submission: Upload System

<https://upload.birdf.com>

Log In

Login / Create new account

Username

Password

☐ Remember me

Forgot password?

Login

Create a new account

Company Projects			
<div><div></div></div>			
Project ID	Project title	Partner (Your Partner's Company username)	Stage
BOG-06-2017-P			Reports
			Continue

Uploading Documents

BOG-06-2017-P

Created By

Last update on 28 Jun 2017 01:42

Executive Summary

(Closed)

Proposal

(Closed)

Reports

(Open)

Project report number

BIRD Ref. 1111

Segments

Segment #	Fiscal US	Fiscal IL	Technical
1	Uploaded	Under Review	Uploaded
2	Not Submitted	Not Submitted	Not Submitted
3	Not Submitted	Not Submitted	Not Submitted

Commercializations reports

Semester	US	IL
1 Jul 2017	0	Not Submitted
1 Jan 2018	0	Not Submitted

Reports Submission: Hard Copies

Sending via courier
one hard copy to our IL office



Photo by [freestocks.org](https://www.freestocks.org/) on [Unsplash](https://unsplash.com/)

Guidelines & Forms → Fiscal & Technical Meetings

The screenshot displays the BIRD website's navigation and content. The top navigation bar includes links for Home, About, Guidelines&Forms (highlighted), News&Events, BIRD Energy, ENERGY CENTER, BIRD HLS, BIRD Cyber, and Contact. A search bar is located on the right. A dropdown menu for 'Guidelines&Forms' is open, listing: Deadlines, BIRD Call for Proposals, Procedures & Submission Forms, Upload System, Reporting Upload System, **Fiscal & Technical Meetings**, and FAQ's. The main content area features a red header 'Guidelines&Forms' and a blue title 'Fiscal & Technical Meetings'. The text below explains that the purpose of these reports is to enable the BIRD Foundation to monitor project progress and assist in funding decisions. It also states that representatives from approved companies must attend the Fiscal and Technical Reporting meeting, directed by BIRD's PBC (Primary BIRD Contact) and Ms. Natalie Galperin (CFO).

Home • About • **Guidelines&Forms** • News&Events • BIRD Energy • ENERGY CENTER • BIRD HLS • BIRD Cyber • Contact

Deadlines

BIRD Call for Proposals

Procedures & Submission Forms

Upload System

Reporting Upload System

Fiscal & Technical Meetings

FAQ's

Guidelines&Forms


Fiscal & Technical Meetings

The purpose of the fiscal and technical reports is to enable the BIRD Foundation to monitor project progress, actual expenditures on the project and to assist in decisions relating to the continued funding of the project.

Representatives from companies whose projects have been approved for BIRD funding must attend the Fiscal and Technical Reporting meeting, directed by BIRD's PBC (Primary BIRD Contact) and Ms. Natalie Galperin (CFO).

Guidelines & Forms → Fiscal & Technical Meetings

[Home](#) • [About](#) • **[Guidelines&Forms](#)** • [News&Events](#) • [BIRD Energy](#) • [ENERGY CENTER](#) • [BIRD HLS](#) • [BIRD Cyber](#) • [Contact](#)

BIRD Fiscal & Technical Zoom Meeting Recording & Presentations – September 2022

[Zoom Meeting Recording \(YouTube\)](#)

[Introduction \(pdf\)](#)

[Technical Reporting Presentation 2022 \(pdf\)](#)

[Fiscal Reporting Presentation 2022](#)

[CPFA Section \(pdf\)](#)

[Fiscal Section \(pdf\)](#)

Good Luck!



Israel-United States Binational Industrial Research and Development Foundation

www.birdf.com

[www.facebook.com/BIRD Foundation](https://www.facebook.com/BIRD-Foundation)

[linkedin.com/company/bird-foundation](https://www.linkedin.com/company/bird-foundation)