



Technical Reporting



Israel-United States Binational Industrial Research and Development Foundation

www.birdf.com

Reporting Objectives



Objectives:

- Monitor project progress.
- Put us all on the same page and assist you making better decisions that will optimize
 your grant utilization, and overcome unforeseen challenges Examples: Project
 extension, Funding utilization.

We want you to succeed.

Transparency - We'll assist you the most if you keep us updated on the project status for the good or bad.

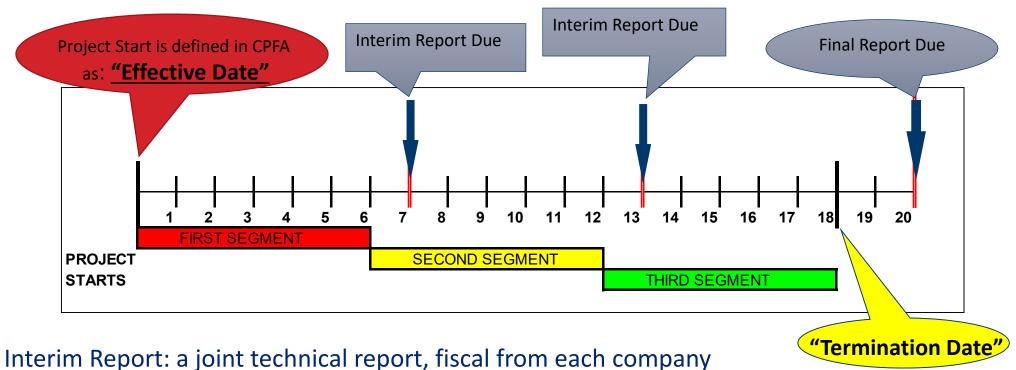
Reporting Schedule



- Each project is divided into segments (usually of 6 months (CPFA))
- **Technical and Fiscal reports** End of each segment within 30 days following the segment conclusion.
- Technical Jointly submitted and signed.
- Fiscal submitted separately by each company.
- Upload system & Hard Copies
- Same period dates on the technical and fiscal reports
- PBC & Finance team review the reports -> E-meeting
- Approval of the reports by BIRD is a prerequisite for continued funding of the project
- Final & Marketing reports should be submitted within 60 days following project completion (termination).

Reporting Schedule - Example





- <u>Interim 1</u> Reports due 1 month after the end of 1st segment
- Interim 2 Reports due 1 month after the end of 2nd segment
- Final report (Final report + Presentation) due 2 months after end of project

Reports: General Guidelines



- Prepare the reports "by the book" https://www.birdf.com/wp-content/uploads/2021/07/ReportFormats_72021.pdf
- A comprehensible report templates follow the instructions
- Using acronyms or abbreviations? Kindly provide the glossary of terms
- Reports that are difficult to understand, missing information, chapters are not according to the template, unexplained deviations from the Program Plan may lead to delays of reports approval, which could lead to a delay of the next segments payment.

Questions ?

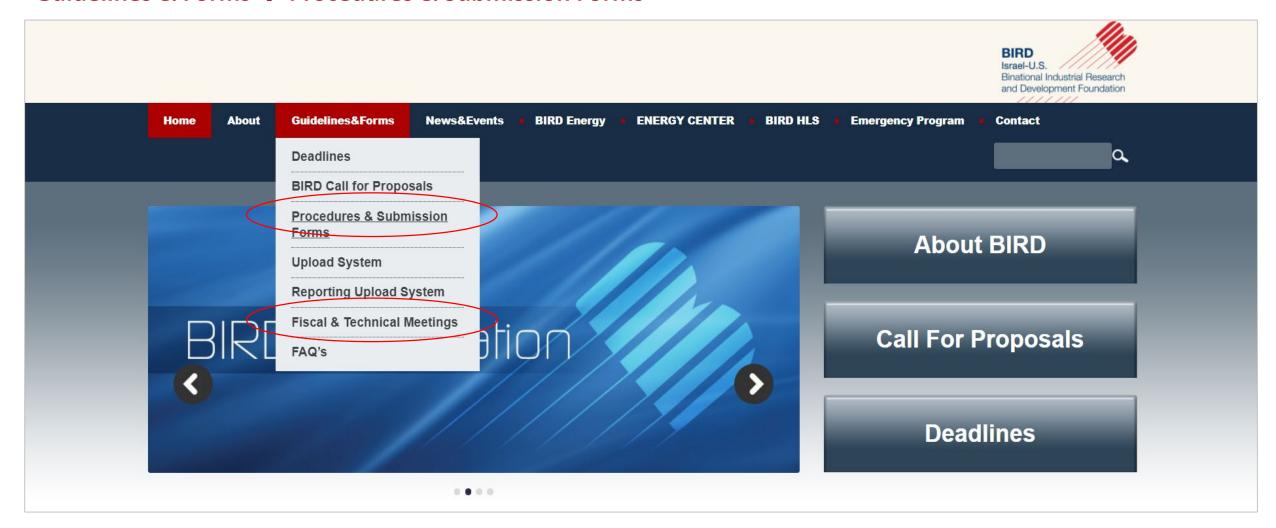
Call us !



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



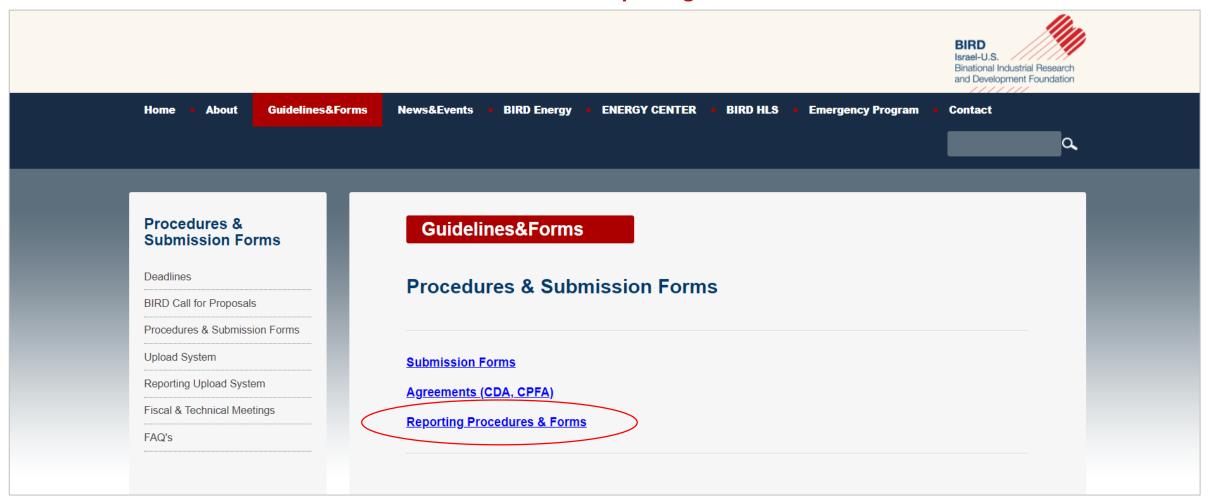
Guidelines & Forms → Procedures & Submission Forms



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



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

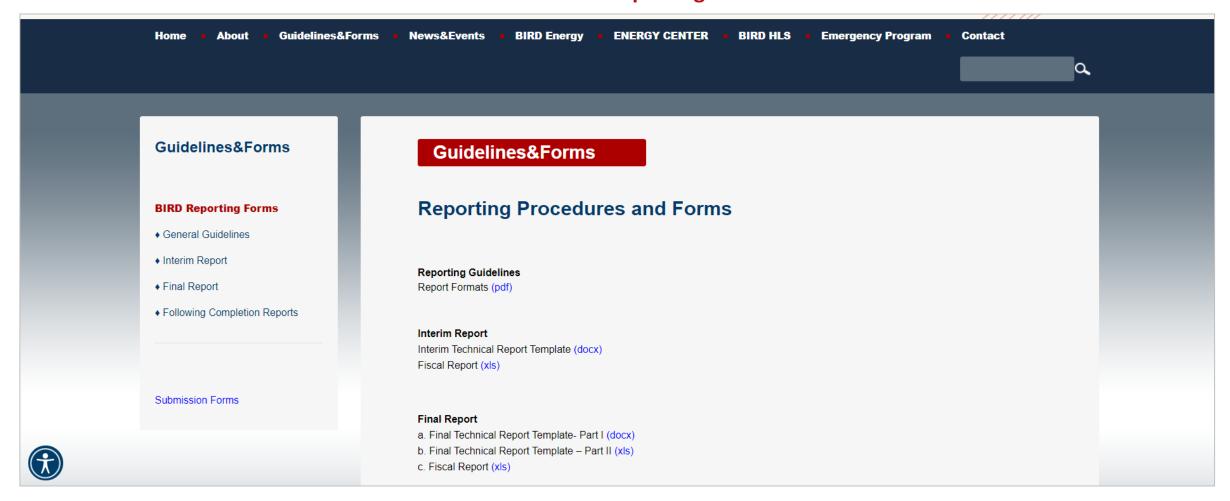


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Reporting Documents on BIRD's Website



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



Technical Reports: Templates







Report Cover Page

Make sure that the report is signed by both companies

Interim Technical Report Cover Page

o: Israel-U.S. Binational Ind	ustrial Research and Dev	elopment Foundation
Project Title:		
Submitted by:		
Israeli Company:		
U.S. Company:		
Type of Report: Interim - Seg	gment # :	
Project Effective Date (Start (Date DD/MM/YY):	
Project Termination Date (En	d Date DD/MM/YY):	
Dates of Reporting Segment	Covered (DD/MM): from	to
Signatures:		
Signatures: Project Manager:	Israeli Company	U.S. Company
	Israeli Company	U.S. Company
Project Manager:	Israeli Company	U.S. Company
Project Manager: Printed Name:	Israeli Company	U.S. Company
Project Manager: Printed Name: Title:	Israeli Company	U.S. Company
Project Manager: Printed Name: Title: E-mail:	Israeli Company	U.S. Company
Project Manager: Printed Name: Title: E-mail: Telephone no.:	Israeli Company	U.S. Company
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(see Procedures Handbook)

1. Table of Contents

2. Objectives:

- of the project
- of the segment covered by report
- How they compare with the original plan?

Sections 2-4:
Actual project status
and how it compares
with the original plan



3. Summary of Accomplishments:

This is the "story" of this segment – Major part of the report - Free text

- A summary of the segment Describe it: methods used, accomplishments, milestones & deliverables. Add diagrams, images or any other demonstration means.
- Compare the accomplishments with the objectives

4. Results:

- A detailed reference to the tasks (based on the Gantt Chart)
- Milestones attained and deliverables
- Deviations from the Program Plan
- Implications of modifications on the project plan/product



Section 4 – Tables – Tasks, Milestones & Deliverables

Task No.	Task Name	Responsibility & proposed timeline	Status & Progress	% Completion
1				
2				
3				
4				
5				

Use the same Task No. and the Task Name that appears in the original Project Plan



#	Milestones Attained in Previous Segments (Definition / Description)	Attained Milestone Date (MM/YY)
1		
2		
3		
#	Deliverables Available in Previous Segments (Definition / Description)	Available Deliverable Date (MM/YY)
1		
2		
#	Milestones Attained in This Segment (Definition / Description)	Attained Milestone Date (MM/YY)
1		
2		
3		
#	Deliverables Available in This Segment (Definition / Description)	Available Deliverable Date (MM/YY)
1		
2		
#	Milestones Planned for <u>but Not yet Attained in This Segment</u> (Definition / Description and reasons for the lag)	Most Recently Planned Milestone Date (MM/YY)
1		
2		
3		
#	Deliverables Planned for <u>but Not yet Available in This Segment</u> (Definition / Description and reasons for the lag)	Most Recently Planned Deliverable Date (MM/YY)
1		
2		



5. Plans for Next Project Segment – Similar tables as in section 4

- Rescheduling or additions to activities
- Impact of changes on original Program Plan
- If needed ask your PBC for extensions up to 3 months before the project termination date

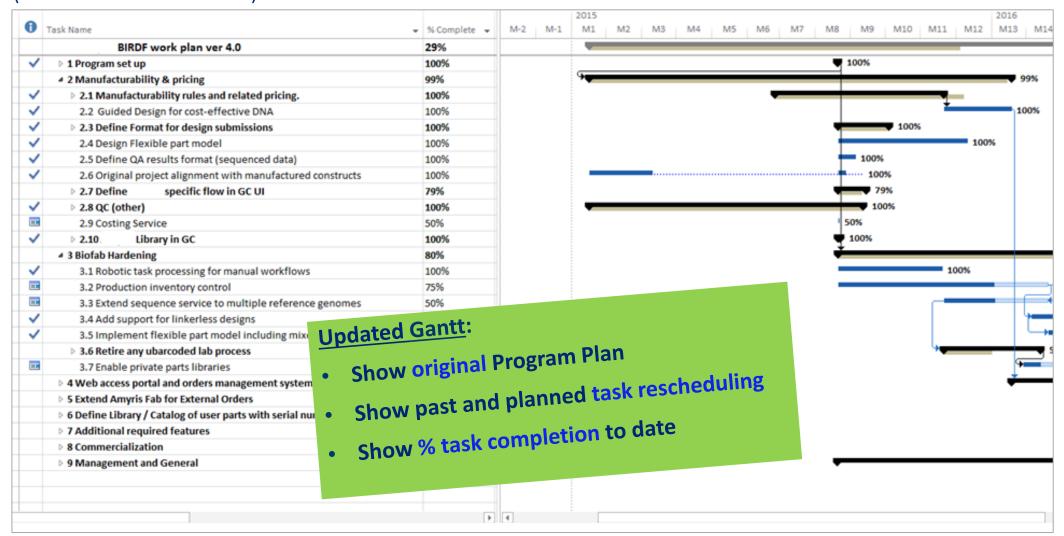
6. Project Plan Dynamics

- Current Gantt chart status and the deviations from the original Program Plan (Annex D of CPFA).
- You can use any software (EXCEL, Project MS, etc.)





(see Procedures Handbook)





7. Cooperation among the partners

- Communication & coordination of activities
- Encountered challenges ?
- Corrective measures taken when needed

A key ingredient for a successful BIRD project is Successful Cooperation & Communication between the partners

- Build and manage an efficient and solid communication mechanism:
 - Develop communication routes, not a single one
 - Develop agreed procedures in case of challenges
 - Create formal and Informal relationships between the companies

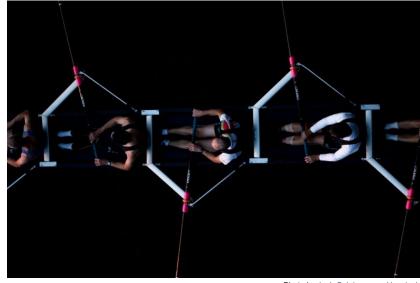


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8. Risk Analysis

- Proposal original Risk Analysis Table
- Identified any change in risk factor? New Risk factors? Updated Risk Analysis Table
- Add explanation If and how this may influence the project/deliverable?



				Impact
Name	Ranking	Duration	Budget	Commercialization Potential
"Coating does not meet all requirements"	Medium	Medium	Medium	Medium
"Concept of Operation is not acceptable by the FAA"	Low	Medium	Low	Medium



9. Market and Commercialization Plans

- Changes in market potential or sales forecast
- Impact of market changes on Program Plan

10. Published Information

- Articles in professional literature
- Patents
- Press releases

APPENDICES





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

Part I: Same as in Interim Reports (except section 5 – "Plans for Next Project Segment")

AND 4 New Sections:

Section 9 - Future Activities (following project completion):

- Future R&D planned activities
- Future marketing activities to be undertaken,
 (jointly/separately) as part of the Product sales efforts

Section 11 - Updated Market Forecast

Section 12 – Summary of Market Size & Growth

Appendix – Project Summary Presentation





Section 11 – Updated Market Forecast

	Name	Market A	Market B	Name	Please enter a short name to define each product and market
Product 1		1A	1B		
Product 2		2A	2B		



Define up to 2 relevant markets for the developed product(s) and up to 2 products targeted for these 2 markets. Enter a short (up to 30 characters) name for each one of the pairs of product / market chosen (up to 4 such paired combinations).

Please note that these defined products / markets should represent all the revenue sources expected from the products developed in the BIRD project.



Section 12 – Summary of Market Size

The summary of the sales forecast of all the combination you identified in section 11.

Use the EXCEL File Final Technical Report Part II to calculate this Forecast

Summary of Relevant Markets Size and Growth Rate

	Year Project			
	Terminated	Year 1	Year 2	Year 3
Calendar year:	-	-	-	-
Market size (M\$/yr):				
Annual growth rate (%):	-	-	-	-

Summary of the Forecast of Sales / Licensing Revenue in the Project Proposal

(basis for repayments to BIRD)

	Year Project Terminated	Year 1	Year 2	Year 3
Calendar year:	-	-	-	-
Annual revenue forecasted in Project Proposal (K\$/Yr):	-	-	-	-
Cumulative revenue forecasted in project proposal (K\$/yr):	1	•	-	-

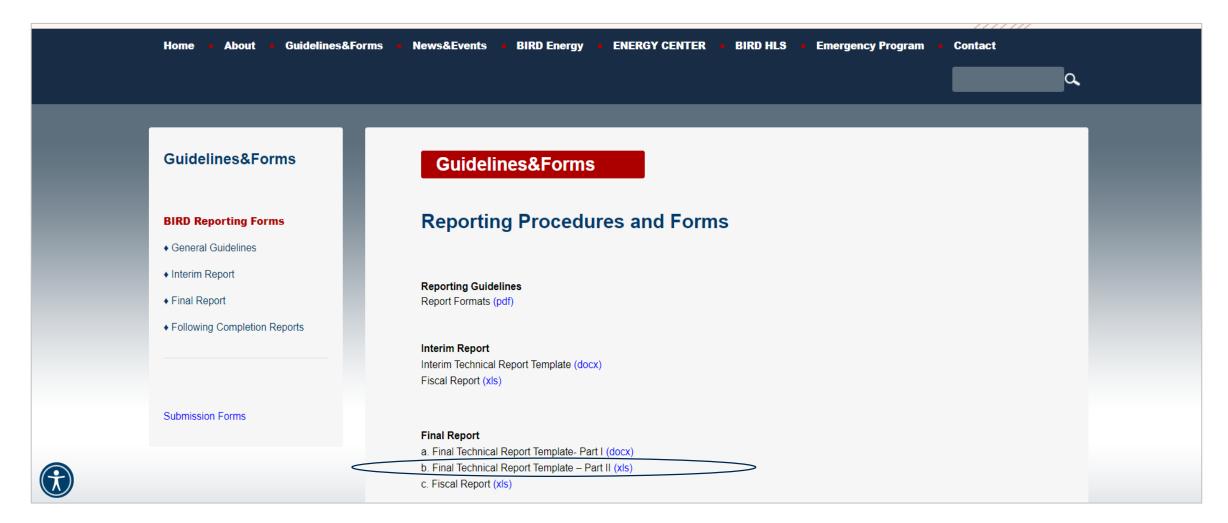
Summary of the Current Sales / Licensing Revenue Forecast

as % of proposal forecast

	Year Project Terminated	Year 1	Year 2	Year 3
Calendar year:	-	-	-	
Forecasted annual sales / licensing revenue (K\$/yr):	_	_	_	_
Revenue basis for repayment to BIRD (% of revenue, as per CPFA):	-	-	-	-
Forecasted annual repayment (K\$/yr):	-			
Cumulative forecasted repayment (K\$/yr):				
Current annual revenue forecast,				



Final Technical Report – Part II (Excel File) - Demonstration





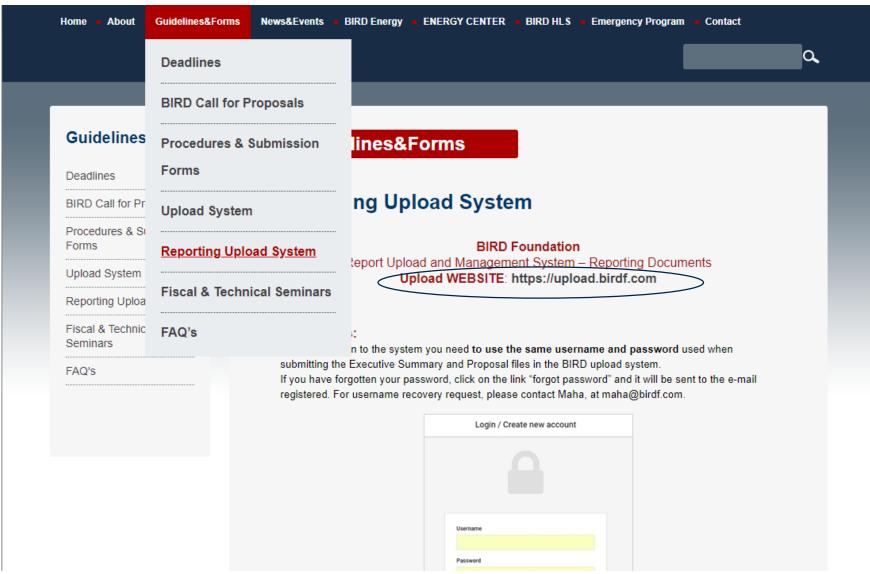
Appendix – Project Summary Presentation

- Project overview, accomplishments vs. objectives.
- Project tasks and schedule.
- Milestones and deliverables.
- Project results and future planned work, jointly and/or separately.
- Collaborations between the partners.
- Road to commercialization marketing & sales activities, plans for the future.
- Sales forecast Based on the Final Report Part II (Excel file)

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Reports Submission: Upload System



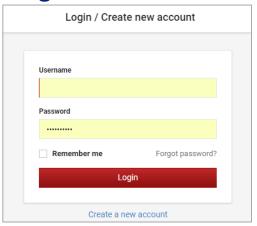


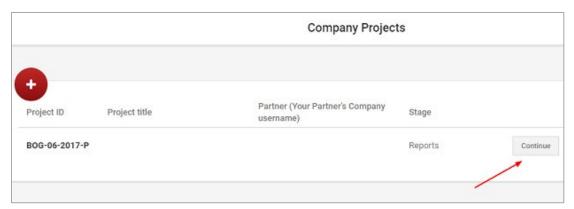
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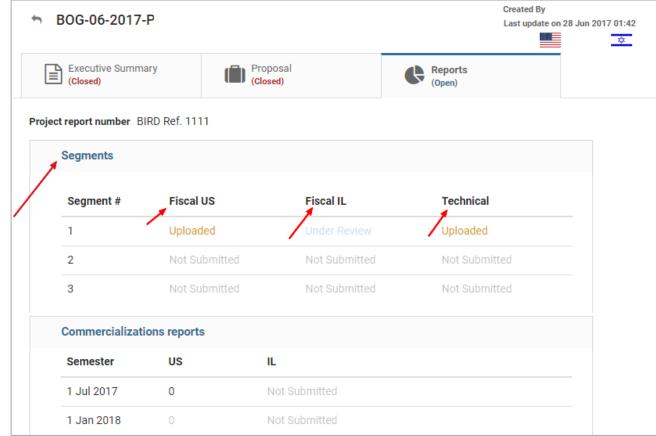
https://upload.birdf.com

Log In





Uploading Documents



Reports Submission: Hard Copies



Sending via courier one hard copy to our IL office



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Frequently Asked Questions



- Actual <u>progress is slower</u> than Program Plan:
 Do I submit TR as scheduled? YES
- Actual <u>spending is less</u> than forecast:
 Do I submit TR as scheduled? YES
- Actual <u>spending is greater</u> than forecast and actual <u>progress is same as or ahead</u> of Program Plan:
 Do I submit TR as scheduled? Contact your PBC
- Only TR/Fiscal report is ready:
 Will submitting TR without fiscal reports for same period, or submitting fiscal reports without TR reports be of any advantage? NO



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Frequently Asked Questions



- What happens if the project scope changes?
 - ✓ Advise PBC in writing/meeting
 - ✓ Request formal (written) modification by both companies
 - → Include fiscal implications
 - → Include new program plan
- What happens if <u>more time</u> is needed to complete the project?
 - ✓ Advise PBC in writing/meeting
 - Submit formal (written) request by both companies
 - → Include reasons for delay, and implications
 - → Include extended program plan
- What happens if project is completed ahead of schedule?
 - **✓** Complete and submit reports



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Good Luck!





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